

2016 EXIT SURVEY PROFILE OF VACATION VISITORS FROM CANADA



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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 *Profile of Vacation Visitors from Canada* focus on the peak travel season May to October.

MODE OF TRAVEL

This profile of **Canadian vacation visitors** focuses on non-residents from Canada who visited Newfoundland and Labrador for vacation during the peak travel season of May to October. Vacation visitors represent 32% of all Canadian travel parties. It is estimated that a total of **56,602 Canadian non-resident vacation travel parties** visited Newfoundland and Labrador during the May to October period, representing a total of 124,553 visitors.



73%



27%

Air travel to the province among vacation visitors continues to dominate, with nearly three-quarters (73%) of Canadian vacationers travelling by air while just over one-quarter of Canadian visitors travelled to the province by car.

The share of Canadians travelling by air has increased from 69% in 2011. On a provincial basis, over half (52%) of Maritimers drive to the province while 48% arrive by air. Just under half (49%) of visitors from Quebec arrive by auto while 51% arrive by air. Air travel dominates among visitors from Ontario and Other Canada, with 8 in 10 vacation parties from each of these regions flying to the province. Clearly, distance to the province plays a role in whether Canadian vacation visitors travel by air or auto.

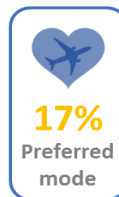
Table 2: 2016 Non-Resident Visitor Parties (Canada) – Mode (% Parties; May to October)

	Air	Auto
All Vacation	72%	28%
Canada	73%	27%
Maritimes	48%	52%
Quebec	51%	49%
Ontario	80%	20%
Other Canada	82%	18%

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



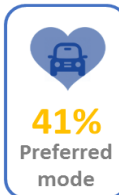
Motivations of Canadian Vacationers Travelling by Air



When choosing their mode of travel, Canadian air and auto vacation travellers have different motivations. By far the biggest motivator for Canadian vacation travel parties to fly to the province was a desire to save time, allowing them to spend more time in the destination. Distance, convenience, a general preference for air travel, and saving money round out the top five factors in the decision to fly.



Motivations of Canadian Vacationers Travelling by Auto



Auto visitors, on the other hand, were largely motivated to drive to the province by the desire to do and see more along the way as well as the flexibility and the ability to set their own schedule. For half of Canadian vacationers, travelling to Newfoundland and Labrador was part of a road trip while 4 in 10 parties claimed travelling by car as their preferred mode of travel. Over one third of Canadian vacation parties wanted to experience the ferry as part of their trip to the province.

VACATION VISITOR ORIGIN

81% of vacation visitors to Newfoundland and Labrador are from Canada

Chart 2 shows the origin of visitors who come to the province for vacation. As in 2011, Canada remains the province's largest source market, accounting for eight in ten vacation travel parties.

Chart 3 shows the regions of origin of Canadian vacation visitors. Visitors from Ontario account for half of Newfoundland and Labrador's Canadian vacationers. One quarter of Canadian vacation parties are from provinces west of Ontario and the Territories (Other Canada), with Alberta accounting for 11% of these parties and British Columbia for another 8%. Just under 1 in 5 parties are from the Maritimes, with Nova Scotian vacationers representing 13%. Visitors from Quebec account for 7% of Canadian vacation visitors to the province. Compared to 2011, slightly more of the province's Canadian vacation visitors came from Other Canada (25% vs. 23%) and Quebec (7% vs. 6%), with the same share coming from Ontario (50%) and fewer coming from the Maritimes (18% vs. 21%), with Nova Scotia driving this change.

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

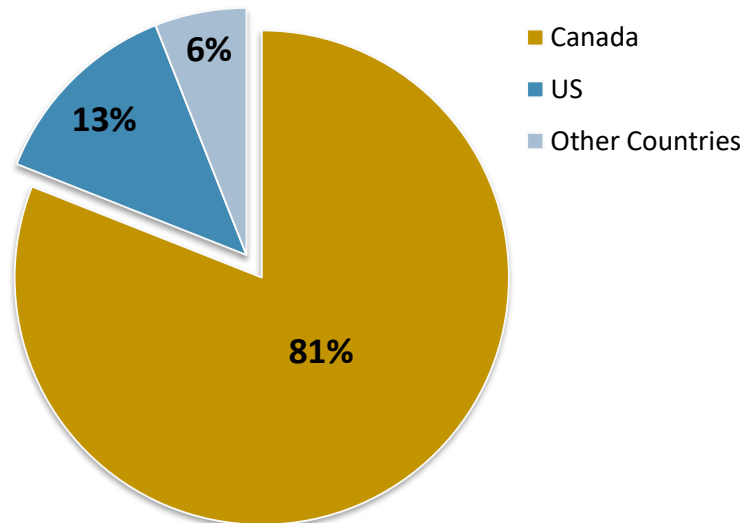
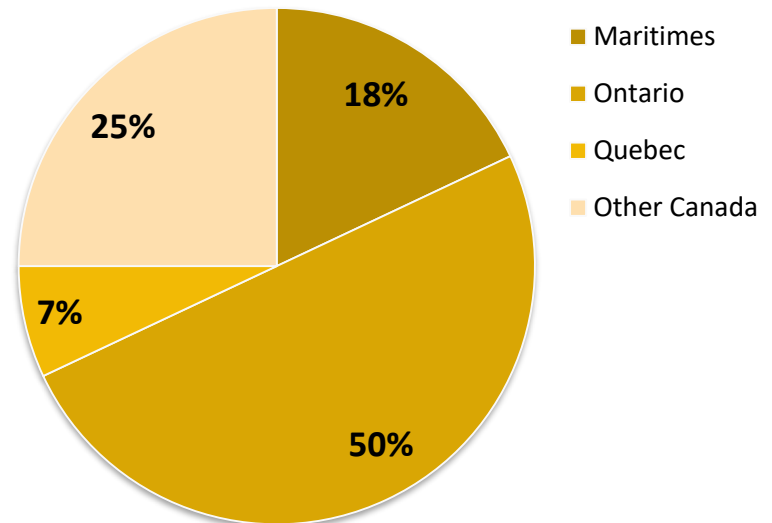


Chart 3: 2016 Non-Resident Vacation Parties (Canada) – Provincial Origin (% Parties; May to October)



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

FIRST TIME & REPEAT VISITORS

Over 60% of Canadian vacationers are visiting for the first time

Table 3 shows the rates of repeat and first time visitation for Canadian vacation travel parties to the province. Compared to vacation visitors overall, Canadian visitors are slightly less likely to be visiting the province for the first time (63% vs. 65%). At 59%, Canadian visitors travelling by car in particular are more likely to be repeat visitors while over 6 in 10 Canadian visitors travelling by air are new to the province. At 68%, visitors from the Maritimes are most likely to have visited before, while residents of Quebec (73%) and Other Canada (79%) are most likely to be visiting the province for the first time. At 81% of visitor parties, British Columbia has the highest share of first time visitors.

Table 3: 2016 Non-Resident Vacation Parties (Canada) – Repeat and First Time Visitors (% Parties; May to October)

Vacation		Canada Vacation	Canada Air	Canada Auto
Repeat	35%	37%	36%	41%
First time	65%	63%	64%	59%

PARTY SIZE

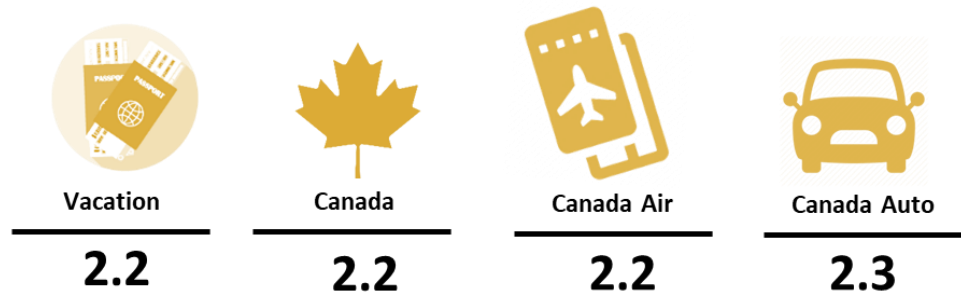
The average Canadian vacation travel party size is 2.2

The average party size of Canadian vacation visitors was **2.2** individuals, the same as that of vacation visitors overall and unchanged from 2011. At 2.3, the average party size of Canadian visitors travelling by auto is slightly higher than that of air parties at 2.2. Parties from Ontario had a slightly larger party size of 2.3 while other Canadian provinces averaged 2.1.

Table 4: 2016 Non-Resident Vacation Parties – Average Party Size by Trip Purpose and Mode (May to October)

	Average Party Size
All Vacationers	2.2
Canada	2.2
Maritimes	2.1
Quebec	2.1
Ontario	2.3
Other Canada	2.1

Chart 4: 2016 Non-Resident Parties (Canada) – Average Vacation Party Size by Mode (May to October)



PARTY COMPOSITION

Most Canadian vacationers visit Newfoundland and Labrador as couples

Similar to vacation visitors overall, just over half (53%) of Canadian vacation parties travel as couples with no children. One in five Canadian visitors travel solo, while 12% travel with other family members and 8% travel with a group of friends. Another 7% travel as couple(s) with children. Travellers from the Maritimes are more likely to travel solo (26%) compared to visitors from other provinces while nearly 6 in 10 visitors from Quebec travel as couples with no children.

The share of Canadian parties travelling as couples without children is considerably higher than other types of travel parties, with Canadian auto visitors even more likely to travel as couples at 60% vs. 50% of air travellers. While 23% of Canadian air travellers vacation in the province solo, just 13% Canadian auto visitors travel by themselves.

Compared to 2011, there has been a drop in the share of Canadian vacationers travelling solo (25% vs. 20%), with increasingly more Canadians travelling as couples with no children (44% vs. 53%). The number of visitors from Canada travelling to the province with other family members decreased from 18% in 2011 to 12% in 2016.

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

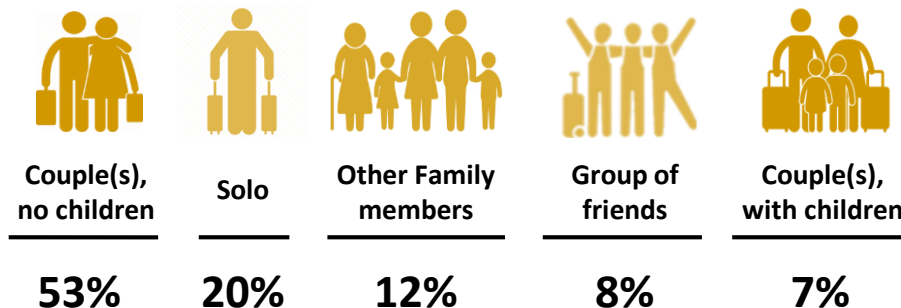


Table 5: 2016 Non-Resident Vacation Parties (Canada) – Party Composition (% Parties, May to October)

Party Composition	Vacation	Canada Vacation	Canada Air	Canada Auto
Solo	21%	20%	23%	13%
Couple(s), no children	51%	53%	50%	60%
Couple(s), with children	7%	7%	6%	9%
Other family	12%	12%	13%	10%
Group of friends	8%	8%	8%	8%
Business Associates	<1%	<1%	<1%	<1%



64%

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

LENGTH OF STAY

On average, Canadian vacation visitors spend 10.4 nights in the province

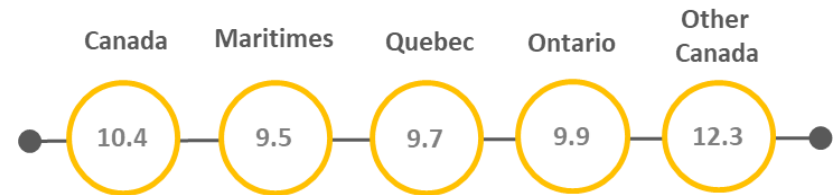


Vacationers from Canada stay an average of 10.4 nights in the province, on par with vacation visitors overall. At 12.5 nights, Canadian parties travelling by car stay considerably longer compared to the average 9.6 nights for Canadians travelling by air. Canadian auto travellers also stay slightly longer than the typical vacation visitor travelling by car (12.5 nights vs. 12.2 nights) while air travellers stay a similar amount of nights as air vacation travel parties overall. **Chart 6** and **Table 6** highlight the average length of stay of Canadian vacation travel parties by origin and mode of transportation. At 12 and 14

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

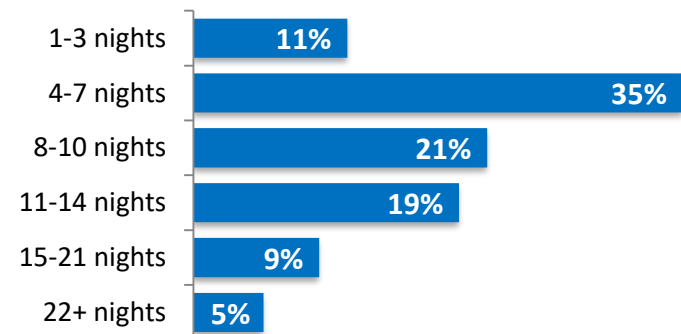
Origin	Overall	Air	Auto
All Vacation	10.4	9.7	12.2
Canada	10.4	9.6	12.5
Maritimes	9.5	9.2	11.5
Quebec	9.7	8.0	11.6
Ontario	9.9	9.3	12.2
Other Canada	12.3	12.0	14.0

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



nights respectively, both air and auto vacation visitors from Other Canada spent the longest vacations in the province, averaging 12.3 nights overall. Visitors from Ontario spent almost 10 nights in the province, with auto parties from Ontario staying 12.2 nights on average. Residents of Quebec and the Maritimes had somewhat shorter vacations in Newfoundland and Labrador, at 9.5 and 9.7 nights respectively. Nearly half (46%) of Canadian vacation parties had shorter stays of 1-7 nights in the province while one third stayed 11 nights or longer.

Chart 7: 2016 Non-Resident Vacation Parties (Canada) – Length of Stay by Number of Nights (% Parties; May to October)



EXPENDITURES

On average, Canadian vacation visitors spend \$3,417 per trip

Spending by non-resident visitors is a function of trip purpose, length of stay as well as party size. As shown in **Table 7**, at \$3,417, Canadian vacation visitors reported slightly lower per party spending than vacation visitors overall. Canadian vacation parties travelling by air spent an average of \$3,745 while those travelling by auto spent substantially less, at \$2,465. Total average spending by Canadian vacation travel parties increased markedly from 2011 when they reported per party spending of \$2,606.

Table 7: 2016 Non-Resident Vacation Parties – Average Expenditure By Mode (May to October)

Origin	Overall	Air	Auto
All Vacation	\$3,470	\$3,773	\$2,600
Canada	\$3,417	\$3,745	\$2,465

Average vacation party expenditures also vary by provincial origin. Canadian vacationers from Ontario reported the highest per party spend (\$3,750), followed closely by residents from Other Canada (\$3,617). Vacationers from the Maritimes and Quebec spent less at \$2,397 and \$2,869 respectively, generally due to shorter stays.

Chart 8: 2016 Non-Resident Vacation Parties (Canada) – Average Per Party Expenditure by Origin (May to October)

MARITIMES	QUEBEC	ONTARIO	OTHER CANADA
\$2,397	\$2,869	\$3,750	\$3,617

Table 8 below notes that Canadian vacation visitors spent \$1,618 *per person*, and \$188 *per person per night* in Newfoundland and Labrador (up from \$1,189 *per person* and \$131 *per person per night in 2011*). On a per person per night basis, Canadians travelling by air spent considerably more than those who travelled by car, at \$205 per night compared to \$138 per night.

Table 8: 2016 Non-Resident Vacation Parties (Canada) – Average Expenditures (May to October)

	Vacation	Canada Vacation	Canada Air	Canada Auto
Average Spend per Party	\$3,470	\$3,417	\$3,745	\$2,465
Average Spend per Person	\$1,681	\$1,618	\$1,738	\$1,265
Average Spend / Person / Night	\$200	\$188	\$205	\$138

\$3,404

Canadian
first time visitor
party spending

EXPENDITURE PATTERNS

At 42%, the largest share of travel expenditures by Canadian vacationers goes to accommodations

Spending can be attributed to a variety of categories, with accommodations accounting for 42% of the dollars spent by Canadian vacation travel parties, similar to the share spent on accommodations by vacation visitors overall (43%). The share of spending on accommodations has also increased noticeably since 2011, when Canadian vacation visitors reported spending 36% of their dollars on accommodations. Compared to 2011, Canadians reported spending less of their travel expenditures on in-province transportation in 2016 (18% vs. 25%).

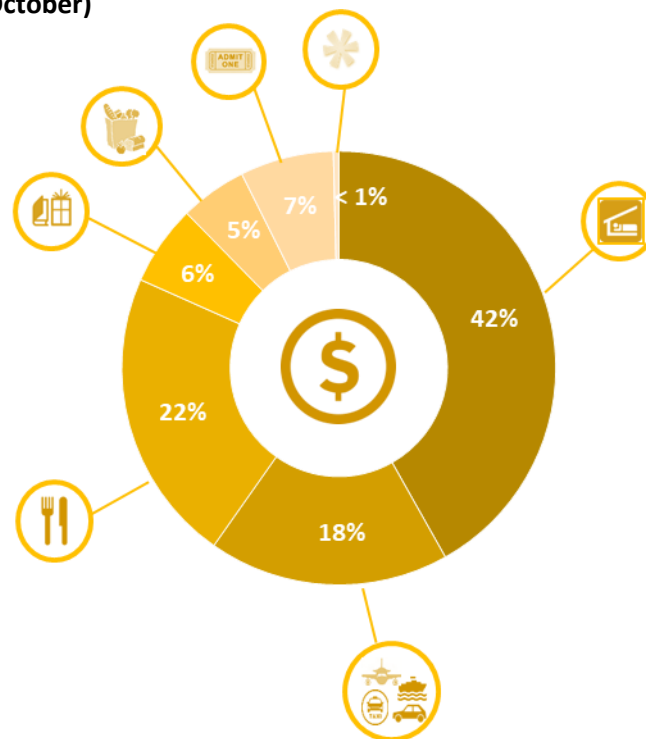
Canadian vacationers spend an additional 22% of their money in the province on food and beverages in restaurants, while 18% was spent on transportation. Transportation costs comprise, for the most part, vehicle operating costs such as vehicle rental fees, gasoline and maintenance as well as local transportation such as provincial ferry fares and taxis. Spending on activities and experiences accounted 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 9: 2016 Non-Resident Vacation Parties (Canada) – Per Party Expenditure Patterns (May to October)

Expenditure Type	Vacation	Canada Vacation	Canada Air	Canada Auto
Accommodations	43%	42%	42%	43%
Restaurants	21%	22%	22%	20%
Transportation	17%	18%	18%	16%
Activities, Experiences	7%	7%	7%	7%
Arts, Crafts, Souvenirs	6%	6%	6%	7%
Groceries	5%	5%	4%	7%
Other	2%	<1%	<1%	<1%

Regardless of how they travel to the province, Canadians spend most of their dollars on accommodations and restaurants. However, at 19%, the share of transportation costs is higher for Canadian air vacationers, likely due to the cost of rental vehicles. Canadians who fly to the province spend a slightly higher share of their expenditures on restaurants (22% vs. 20%) while auto vacationers are spending more on store-bought groceries (7% vs. 4%).

Chart 9: 2016 Non-Resident Vacation Parties (Canada) – Travel Party Expenditure Shares by Category (May to October)



ACCOMMODATIONS

Hotels/motels are the most popular type of accommodations with Canadian vacationers

Overall, 94% of Canadian vacation visitor parties stay in paid accommodations, with 84% of nights in the province being spent in some form of paid accommodations.

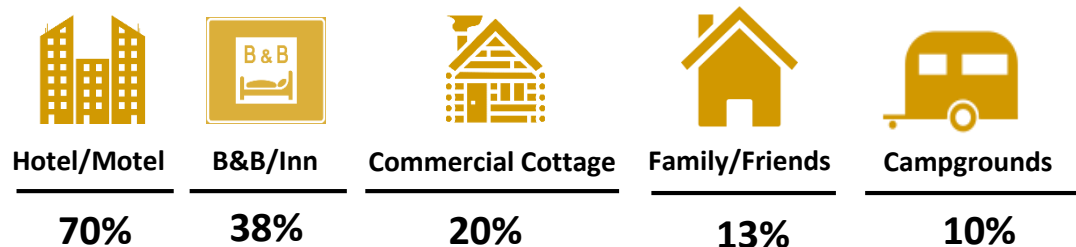
Hotels and motels are the most popular form of accommodation for Canadian vacation visitors, with 70% staying in hotels/motels and 37% of nights in the province being spent there. Bed & Breakfasts/Country Inns are the second most popular among Canadians, with almost 4 in 10 parties staying in this type of accommodation, accounting for 20% of nights. Twenty percent of vacation parties from Canada reported staying in commercial cottages/cabins, with 8% of total in-province nights spent there. Campgrounds are also relatively popular among Canadian vacation visitors, with 1 in 10 parties camping at National, Provincial and private campgrounds, accounting for 7% of total nights spent in the province.

Accommodations used by Canadian vacation parties also depend on how they travel to the province: compared to Canadians travelling by car, air parties tend to spend a greater share of nights in hotels/motels (41% vs. 27%) and B&Bs/Country Inns (22% vs. 14%). Canadian auto travellers, on the other hand, spend a much greater share of nights at campgrounds (18% vs. 3%) and in their own homes/residences (13% vs. 4%) than air travellers.

Table 10: 2016 Non-Resident Vacation Parties (Canada) – Share of Party Nights by Type of Accommodation (% Nights; May to October)

Accommodation Type	Vacation	Canada Vacation	Canada Air	Canada Auto
Hotel/Motel	37%	37%	41%	27%
B&B/Country Inns	20%	20%	22%	14%
Commercial Cabins/Cottages	8%	8%	8%	8%
Rented Vacation Home	6%	6%	7%	3%
Apartment/room in private home (not owned by relative/friend)	3%	3%	3%	1%
Campgrounds – All Types	8%	7%	3%	18%
Commercial Outfitting Camps	2%	1%	1%	3%
Houses/Cabins of Relatives/Friends	8%	9%	9%	10%
Own Home/Residence	7%	7%	4%	13%
All Other Types of Accommodation	3%	2%	2%	3%

Chart 10: 2016 Non-Resident Vacation Parties (Canada) – Share of Parties Using Type of Accommodation (% Parties; May to October)



OVERNIGHT DESTINATIONS

Gros Morne area and Gander/Twillingate are even more popular among Canadians

Table 11: 2016 Non-Resident Vacation Parties (Canada) – Destinations Visited and Stayed at Least One Overnight (% Parties; May to October)

Destination	Vacation	Canada Vacation	Canada Air	Canada Auto
Zone 1: Rigolet to Nain	0.0%	0.0%	0.0%	0.0%
Zone 2: Labrador West/Churchill Falls	0.3%	0.1%	0.0%	0.5%
Zone 3: Happy Valley/Goose Bay/Northwest River	1.7%	1.3%	1.6%	0.6%
Zone 4: Mary's Harbour to Cartwright	0.9%	0.4%	0.4%	0.3%
Zone 5: Labrador Straits (L'Anse Au Clair to Red Bay)	6.0%	6.1%	7.7%	2.0%
Zone 6: Viking Trail, St. Anthony South West to Plum Point, East to Roddickton/Englee	23.3%	22.7%	20.8%	28.0%
Zone 7: Gros Morne Area, Viking Trail North to and including Plum Point	45.2%	45.8%	41.0%	58.7%
Zone 8: Deer Lake/Humber Area	18.8%	18.3%	17.1%	21.7%
Corner Brook/Massey Drive	14.5%	15.8%	12.1%	25.8%
Zone 9: Stephenville/Port-au-Port/Burgeo	4.2%	4.6%	1.0%	14.6%
Zone 10: Port-aux-Basques/Doyles/Rose Blanche	10.4%	9.6%	1.0%	32.9%
Zone 11: Baie Verte/La Scie/Green Bay	5.3%	5.1%	4.3%	7.4%
Zone 12: Grand Falls Windsor Area	10.4%	11.1%	9.5%	15.4%
Zone 13: Bay D'Espoir Area	0.3%	0.3%	0.1%	1.0%
Zone 14: Gander/Twillingate East to Terra Nova	42.6%	44.0%	43.8%	44.7%
Zone 15: Clarenville/Bonavista Peninsula Area	37.6%	39.0%	42.6%	29.3%
Zone 16: Burin Peninsula	3.4%	3.4%	2.9%	4.9%
Zone 17: North West Avalon	9.0%	8.9%	9.9%	6.3%
Zone 18: Argentia/Placentia Area	3.9%	3.6%	3.4%	4.2%
Zone 19: North East Avalon (Excluding St. John's)	4.6%	4.8%	4.9%	4.7%
St. John's	71.6%	73.2%	81.5%	50.7%
Zone 20: Southern Shore Area	7.9%	7.4%	8.5%	4.5%

St. John's, the Gros Morne area as well as the Gander/Twillingate and the Clarenville/Bonavista areas are the most popular overnight destinations among Canadian vacation visitors. Over 70% of these parties stayed overnight in St. John's. Almost half of Canadians reported overnight stays in the Gros Morne area and 44% of stayed overnight in the Gander/Twillingate area, while nearly 4 in 10 parties overnighted in the Clarenville/Bonavista area.

The areas of Newfoundland and Labrador visited by Canadian vacationers are greatly influenced by how they travel to the province. Close to 60% of Canadian vacationers travelling by auto 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% Canadians overnighting there. While Canadian air and auto vacationers are equally likely to stay overnight in the Gander/Twillingate area, air vacationers are much more likely to overnight on the Clarenville/Bonavista Peninsula. Some areas along the West coast, including the Port-Aux-Basques and Stephenville areas, are almost exclusive auto overnight stops along the way to or from the Marine Atlantic ferry.

REGIONAL DESTINATIONS

Canadian vacationers take in all regions of Newfoundland and Labrador

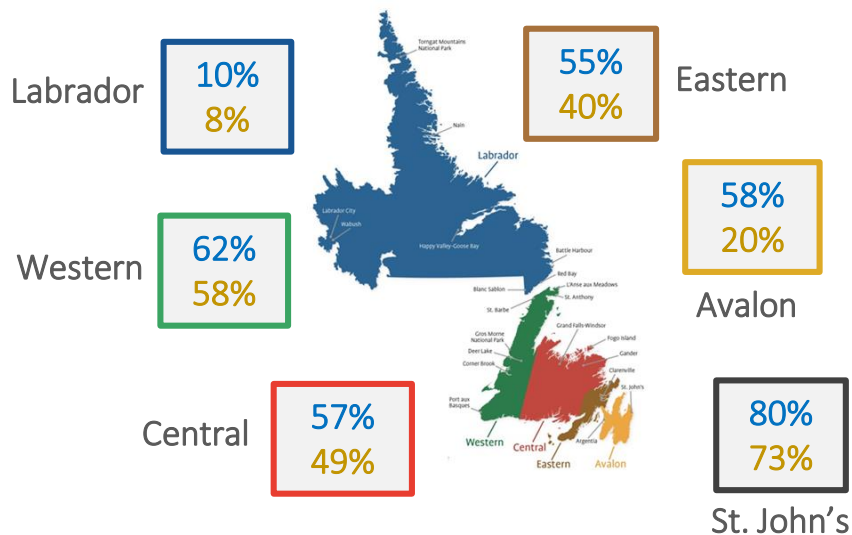
Travel parties visiting the province for vacation continue to travel to all regions of the province. In addition to overnight visitors, the 2016 visitor survey also captured the share of travel parties who visited certain places and attractions without staying overnight. The total share of vacation parties to a region – regardless of whether they stayed overnight or not – is shown in **Chart 11**.

Eight in ten vacation parties (80%) from Canada visited St. John's while 62% of Canadian vacationers visited the Western Region. The Avalon Peninsula attracted 58% of Canadian parties. The Eastern (55%) and Central (57%) Regions were equally popular among Canadian vacation visitors, while 1 in 10 Canadians visited Labrador.

Table 12: 2016 Non-Resident Vacation Parties (Canada) – Regions of Province Visited (% Parties; May to October)

Region	Vacation	Canada Vacation	Canada Air	Canada Auto
St. John's	78%	80%	87%	61%
Avalon Peninsula	57%	58%	63%	43%
Eastern Region	54%	55%	56%	53%
Central Region	55%	57%	53%	65%
Western Region	62%	62%	50%	94%
Labrador	10%	10%	12%	5%

Chart 11: 2016 Non-Resident Vacation Parties (Canada) – Total and Overnight Visitor Parties to Regions of Newfoundland and Labrador (% Parties; May to October)



The level of overall visitation to the province's regions by vacation visitors is highly dependent on their mode of transportation, with almost all Canadian auto parties (94%) taking in the Western region and two thirds visiting the neighbouring Central region. Sixty-one percent of auto visitors also came to St. John's whereas the vast majority of Canadian air visitors (87%) did so. Over 6 in 10 Canadian vacationers visiting by air also took in the neighbouring Avalon region while only half of them visited the Western region. Canadians arriving by air were more than twice as likely as their auto counterparts to visit Labrador.

Canadian vacationers show small differences in the destinations they visited based on their origin: each Island region was visited by more than 60% of parties from Other Canada whereas Maritime parties were more likely to visit fewer regions, topping at 61% visiting the Western region. At 13%, parties from Other Canada were also the most likely to visit Labrador, with only 5% of Maritime vacation parties doing so.

Canadians 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 (93%), Cape Spear (81%) and George Street (69%). Canadian vacationers visiting the Avalon region took in the Witless Bay Ecological Reserve (35%), the East Coast Trail (33%), the Colony of Avalon at Ferryland (33%), and Brigus (33%). Popular attractions and communities among visitors to the Eastern region include Bonavista (68%), Trinity (67%), Clarenville (57%) and Cape Bonavista (56%) .

Among Canadians who visited the Central region, common stops included Twillingate (66%), Gander (62%), various regional hiking and walking trails (47%) and Terra Nova National Park (44%). In the Western region, the most visited attraction among vacation visitors was Gros Morne National Park (88%), followed by regional hiking and walking trails (67%), Corner Brook (57%) and Western Brook Pond (53%). Canadians visiting Labrador were most likely to stop at Red Bay (74%) and other southern Labrador communities, with the Point Amour Lighthouse (55%) and the Labrador Coastal Drive (32%) rounding out the top regional attractions.

Chart 12: 2016 Non-Resident Vacation Parties (Canada) – Top Regional Places and Attractions Visited (May to October)

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

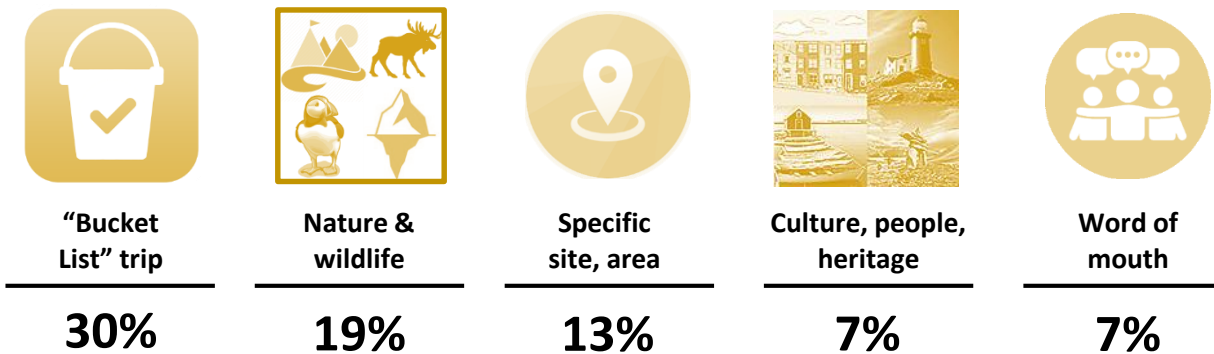
TRIP MOTIVATORS

Many Canadian vacationers have a longstanding desire to visit Newfoundland and Labrador

Many vacation visitors to the province say that experiencing Newfoundland and Labrador is something they have always wanted to do. Compared to vacation visitors overall, those from Canada are even more likely to say that their vacation in Newfoundland and Labrador was a bucket list trip (30% vs. 27%). Nature and wildlife is also a strong motivator, with 19% of Canadian vacationers wanting 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 is also a top trip motivator. By far the most mentioned place that Canadian 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 attractions enticing travellers to visit the province.

Nearly 1 in 10 Canadian vacationers cites our culture, people and heritage as well as our uniqueness as motivating them to visit. Word of mouth or being recommended by others is also influential for 7% of Canadians to choose Newfoundland and Labrador for their vacation. Still other Canadian visitors choose to vacation in the province because of the opportunity to engage in outdoor activities such as hiking or camping. Our TV advertising, previous travel experiences in the province as well as local family ties are also mentioned by Canadians as motivation for their trips.

Chart 13: 2016 Non-Resident Vacation Parties (Canada) – Most Cited Trip Motivators (% Parties, May to October)



Top sites, areas and attractions motivating vacation trips

Gros Morne National Park

L'Anse Aux Meadows

St. John's

Fogo Island Inn

Fogo Island

Western NL / West Coast

East Coast Trail

Eastern NL / East Coast

Signal Hill

Cape Spear

TRIP MOTIVATORS BY PROVINCE OF ORIGIN

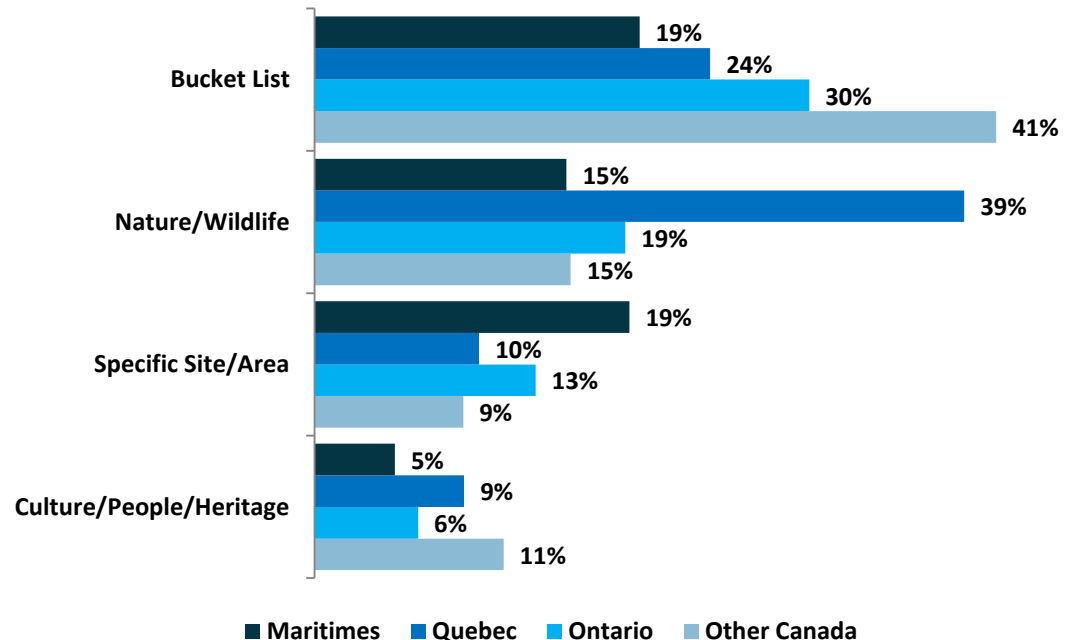
Motivations for visiting Newfoundland and Labrador differ across provinces

From a provincial origin perspective, the motivators of vacation visitors from Ontario, the province's largest source market, tend to mirror the motivations of Canadian vacation visitors overall. Compared to Canadians overall, visitors from Other Canada were significantly more likely to say they visited to fulfil their desire to check Newfoundland and Labrador off their bucket list (41% vs. 30%). This is closely connected to the fact that 79% of these parties are first time visitors to the province. They are also more likely than other Canadian vacationers to be motivated to visit by culture, people and heritage (11% vs. 7%). For visitors from these provinces, nature and wildlife (15% vs. 19%) and visiting specific sites/areas (9% vs. 13%) played less of a role in their decision to visit the province compared to Canadian vacation visitors overall.

Nature and wildlife are the biggest draws for travellers from Quebec who were twice as

41% of visitors from BC, Alberta, the Prairies & the Territories (Other Canada) say their NL vacation is a **bucket list** trip

Chart 14: 2016 Non-Resident Vacation Parties (Canada) – Most Cited Trip Motivators by Province of Origin (% Parties, May to October)



likely (39% vs. 19%) as visitors from elsewhere in Canada to cite scenery, icebergs, whales and seabirds as motivators for their trip. To participate in outdoor activities (11%) also made many Quebecers want to visit. Perhaps unsurprisingly given the proximity and higher share of repeat visitors, Maritimers are least likely to view a vacation in Newfoundland and Labrador as a bucket list trip (19% vs. 30%). Similar to Ontario vacationers, they are not as much motivated by culture, people and heritage. Instead, they are drawn to the province to see a specific site or area (19% vs. 13%), with Gros Morne the top mentioned attraction. Attending an event/festival and fishing were by far stronger motivators than for other Canadians. Word of mouth and our TV ads played a stronger role in motivating vacationers from Ontario than from any other province.

ACTIVITIES & EXPERIENCES

Canadians enjoy strolling around communities and hiking

Chart 15: 2016 Non-Resident Vacation Parties (Canada) – Top 5 Outdoor/Recreational Experiences (% Parties; May to October)



Pleasure
walking

91%



Hiking

79%



Visiting National
Parks

60%



Seabird
watching

55%



Whale
watching

53%

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. High levels of participation in the various outdoor activities are evidence that our vacation visitors are busy explorers and see and do as much as they can during their trip. Visitors from Canada take part in outdoor activities to great extents (see **Table 14** on the next page), with pleasure walking in/around communities (91%) and trail hiking/walking (79%) topping the list. These activities give vacationers the opportunity to take in many of the things that motivate them to travel here - the province's scenery, landscapes, coastlines and wildlife. Our National Parks are also very popular, with 6 in 10 Canadian vacation parties stopping into the four parks. More than half of Canadian vacation parties went seabird watching (55%) and whale watching (53%). Top outdoor experiences have remained consistent since 2011, however, pleasure walking in/around communities, whale watching, geological tours/fossil observation, botanical garden/plant observation and hiking have become even more popular among Canadian vacation visitors.

Despite their shorter stays, Canadian vacationers visiting by air generally have higher participation levels in outdoor activities than auto visitors. They are significantly more likely to go seabird watching (60% vs. 39%), whale watching (57% vs. 42%) or go on sightseeing boat tours (54% vs. 40%). As well, air vacationers are engaged at higher levels in other bird watching, pleasure walking and hiking. Canadian visitors travelling by auto, on the other hand, are much more likely than air parties to visit a National Park (73% vs. 55%) and are slightly more likely to engage in wildlife and iceberg viewing.

Table 13: 2016 Non-Resident Vacation Parties (Canada) – Participation in Outdoor/Recreational Experiences
(% Parties; May to October)

	Vacation	Canada Vacation	Canada Air	Canada Auto
Pleasure walking in/around communities	89%	91%	94%	84%
Hiking/walking on trails	79%	79%	81%	73%
Visited a National Park (Gros Morne, Terra Nova, Torngat Mountains, Mealy Mountains)	59%	60%	55%	73%
Seabird watching (e.g. puffins, gannets, murre)	55%	55%	60%	39%
Whale Watching	52%	53%	57%	42%
Sightseeing boat tour	49%	50%	54%	40%
Visited other parks, including nature parks and ecological reserves	47%	46%	48%	41%
Wildlife viewing	46%	45%	44%	47%
Iceberg viewing	44%	44%	43%	47%
Other bird watching	30%	29%	32%	21%
Geological tour/fossil observation	29%	28%	30%	21%
Botanical garden/plant observation	22%	21%	23%	16%
Ocean fishing	6%	6%	6%	6%
Canoeing/kayaking/rafting	6%	6%	6%	7%
All-terrain/Utility Vehicle (ATV/UTV) Touring	4%	3%	3%	4%
Angling (fresh water)	4%	4%	3%	7%
Golfing	3%	3%	3%	3%
Mountain biking/cycling	3%	2%	2%	4%
Hunting (big game – bear, moose, caribou)	2%	1%	1%	1%
Hunting (small game – hare, grouse)	<1%	<1%	<1%	<1%



Hiking

2011: 55%

2016: 79%



Fossil observation

2011: 13%

2016: 28%



Pleasure walking

2011: 79%

2016: 91%



**Botanical garden/
plant observation**

2011: 9%

2016: 21%

Canadian vacation visitors enjoy exploring communities, historic sites and lighthouses

Chart 16: 2016 Non-Resident Vacation Parties (Canada) – Top 5 Cultural and Heritage Experiences (% Parties; May to October)



**Historic Sites,
museums**

80%



**Exploring small
communities**

78%



**Lighthouse
experiences**

76%



**Culinary
experiences**

72%



**Galleries,
exhibits**

52%

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. Compared to vacation visitors overall, travellers from Canada showed higher levels of participation in nearly all cultural and heritage experiences. Eighty percent of Canadian vacationers took in historic sites and museums, making these attractions an essential component of a visitors' journey through our province. Over three quarters of Canadian visitors also reported exploring our communities (78%), providing them with an opportunity to experience our culture, to meet locals and to enjoy local history. Exploring lighthouses (76%) and experiencing local cuisine (72%) are also top cultural experiences among Canadian vacationers. Over half (52%) of Canadian vacationers visited galleries or exhibits, where they could immerse themselves in experiencing the varied aspects of our cultural and heritage.

Canadian vacation visitors travelling by air tend to take in the range of cultural and heritage experiences to a much greater extent than Canadian vacation visitors travelling by car. Most notably, Canadian air vacationers are almost twice as likely to experience a live performance at a local pub than auto parties (55% vs. 27%) while they also experience local food to a greater extent (76% vs. 60%). Air travellers are more likely to take in lighthouse experiences (79% vs. 67%), visit galleries or exhibits (58% vs. 35%), attend theatre plays or live performances (29% vs. 16%) or participate in a special program at an attraction (18% vs. 8%).

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

	Vacation	Canada Vacation	Canada Air	Canada Auto
Historic sites/museums/interpretation centres	78%	80%	82%	73%
Explored small/rural communities	76%	78%	79%	74%
Experienced nature/history at or around a lighthouse	74%	76%	79%	67%
Local cuisine/culinary experiences	70%	72%	76%	60%
Galleries/exhibits	50%	52%	58%	35%
Went to a local pub for a live performance	45%	48%	55%	27%
Archeological sites (interpretative tour/hands-on dig)	28%	28%	30%	23%
Theatre plays/other live performances	24%	26%	29%	16%
Experienced aboriginal culture/traditions/history	17%	16%	17%	13%
Participated in a special program at an attraction	15%	16%	18%	8%
Watched/participated in creating arts/crafts	9%	9%	10%	5%

Table 15: 2016 Non-Resident Vacation Parties (Canada) – Participation in Festivals and Events (% Parties; May to October)

	Vacation	Canada Vacation	Canada Air	Canada Auto
Participated in a local/community event	15%	17%	17%	16%
Attended a music festival/event	14%	15%	17%	10%
Attended a food/drink-themed festival	6%	7%	8%	5%
Attended/participated in a sports event/tournament	2%	2%	2%	1%
Overall participation in a festival or event	29%	32%	35%	23%

Table 15 shows levels of participation in various types of festivals and events. Canadian visitors reported similar levels of participation in festivals and events as vacation visitors overall but were slightly more likely to participate in a local or community event (17% vs. 15%).

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, Canadians travelling by air were more likely than auto visitors to attend a music festival or event (17% vs. 10%) or a food and drink themed festival (8% vs. 5%).

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

TOP OUTDOOR ACTIVITIES & CULTURAL EXPERIENCES BY PROVINCE

Visitors from Other Canada are the most active and culturally engaged during their vacation in the province

Vacationers from Other Canada report high levels of engagement in many outdoor activities, particularly hiking (85%) and visiting National Parks (67%). Residents of Quebec and Ontario participate in outdoor activities at a similar rate as vacation visitors overall, with Ontarians more likely to go seabird viewing and whale watching. While visitors from the Maritimes participate in the same top outdoor activities as vacationers overall, they do so at lower rates; they are significantly less likely to go seabird or whale watching compared to visitors from other provinces. In line with being motivated to vacation in the province by fishing, Maritimers have a high participation rate in angling.

In terms of taking in the province's culture, history and heritage related experiences, vacationers from Other Canada and Ontario showed the highest engagement levels while Maritimers were generally less engaged, with the exception of culinary experiences. Visitors from Other Canada were significantly more likely than vacationers overall to take in lighthouse experiences (84% vs. 76%) and historic sites (86% vs. 80%).

Table 16: 2016 Non-Resident Vacation Parties (Canada) – Participation in Top Outdoor/Recreational Experiences by Province of Origin (% Parties; May to October)

Top 5 Outdoor Activities	Canada Vacation	Maritimes	Quebec	Ontario	Other Canada
Pleasure walking in communities	91%	84%	89%	92%	95%
Hiking	79%	75%	79%	78%	85%
Visiting National Parks	60%	49%	60%	60%	67%
Seabird viewing	55%	27%	53%	61%	61%
Whale watching	53%	34%	47%	60%	53%

Table 17: 2016 Non-Resident Vacation Parties (Canada) – Participation in Top Cultural and Heritage Experiences by Province of Origin (% Parties; May to October)

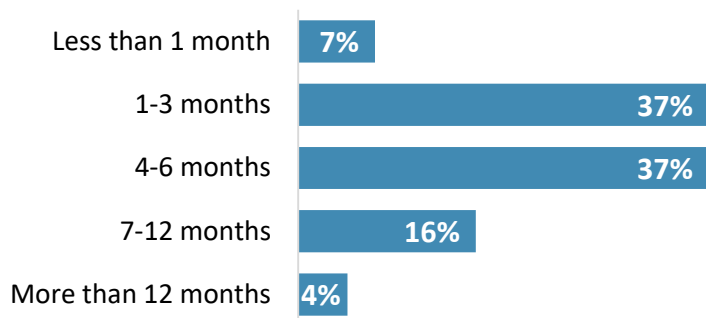
Top 5 Cultural Experiences	Canada Vacation	Maritimes	Quebec	Ontario	Other Canada
Historic Sites, museums	80%	62%	84%	82%	86%
Exploring small communities	78%	60%	75%	82%	81%
Lighthouse experiences	76%	58%	72%	78%	84%
Culinary experiences	72%	62%	55%	76%	74%
Galleries, exhibits	52%	34%	40%	57%	59%

Visitors from Ontario were more likely than visitors from other provinces to experience local cuisine and live performances in local pubs, while historic sites (84%) and exploring small communities (75%) were most popular for Quebecers. Visitors from Other Canada (59%) and Ontario (57%) took in galleries and exhibits to a much greater extent than other Canadian vacationers. More than 3 in 10 vacation parties each from the Maritimes, Ontario and other Canada also participated in a festival or event while only 2 in 10 parties from Quebec did so.

TRIP PLANNING

On average, Canadian vacation visitors plan their trip to the province nearly 5 months in advance

Chart 17: 2016 Non-Resident Vacation Parties (Canada) – Trip Planning Horizon (% Parties; May to October)



With 30% of Canadian vacationers indicating that visiting the province is a bucket list item, it's no surprise that Canadians take a significant amount of time and utilize numerous resources when planning their trip. It takes Canadian visitors, on average, about 4.8 months to plan their trip to Newfoundland and Labrador. Thirty-seven percent of vacation parties need 4 to 6 months of planning time while another 37% take only 1 to 3 months. Sixteen percent of parties plan their trip 7 to 12 months ahead whereas fewer than 1 in 10 parties plan for less than one month.

Chart 18: 2016 Non-Resident Vacation Parties (Canada) – Planning Sources Used Before and During Vacation Trip (% Parties; May to October)

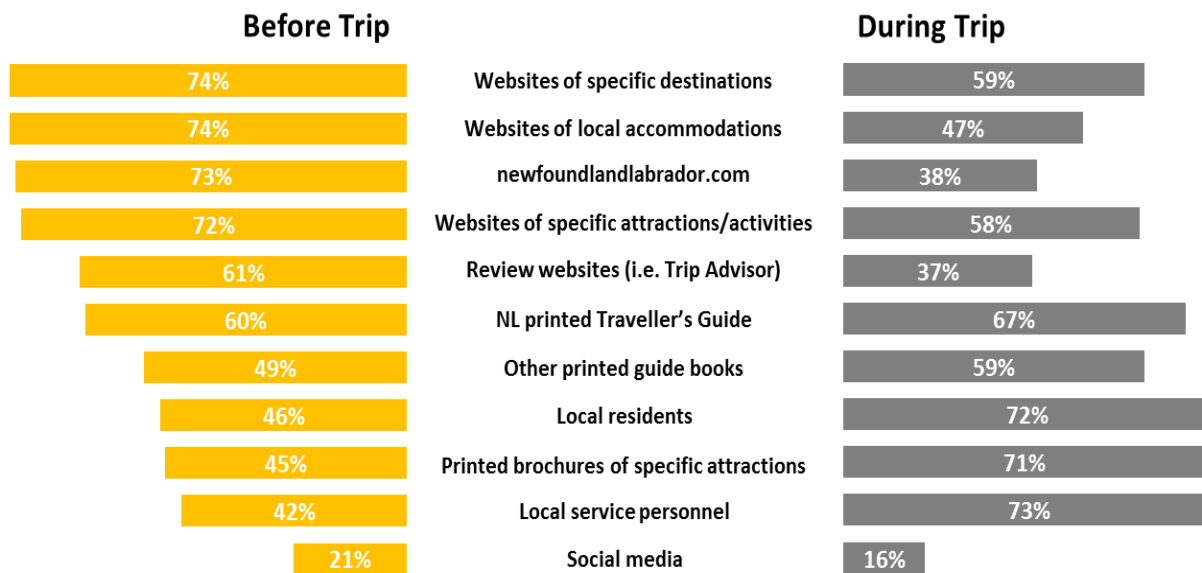
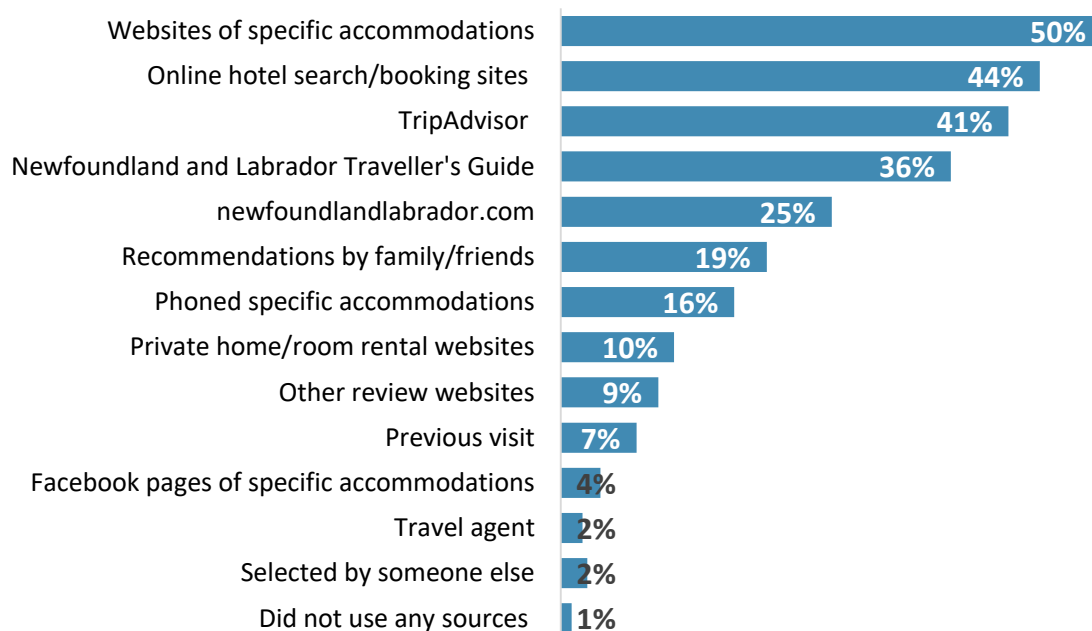


Chart 18 shows the various travel planning sources used by Canadian vacation parties before and during their trip. When planning prior to their trip, vacationers from Canada rely most heavily on web-based sources, with destination websites (74%), local accommodation websites (74%), newfoundlandlabrador.com (73%) and websites of specific attractions or activities (72%) being the most popular trip planning resources. While travelling in the province, Canadian vacation visitors still utilize web-based resources to some extent, however, more visitors are inclined to use printed materials such as attraction brochures (71%) and the NL Traveller's Guide (67%). Utilizing "local knowledge", including residents (72%) and service personnel (73%) is a favourite among Canadian vacation visitors.

Chart 19: 2016 Non-Resident Vacation Parties (Canada) – Sources Used to Select Paid Accommodations (% Parties; May to October)



As with trip overall, when it comes to accommodations planning, online resources also dominate, with half of Canadian 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 (25%) are also popular. Over one-third of Canadian visitors (36%) also utilized the Newfoundland and Labrador Traveller's Guide when choosing paid accommodations. Receiving recommendations from family/friends (19%) and phoning specific accommodations (16%) were also relatively common ways for Canadians to select their accommodations in the province. Experience from a previous visit was helpful for 7% of travel parties.

VISITOR INFORMATION CENTRES

Visitor Information Centres (VICs) are an essential resource for Canadian vacation visitors

At 57%, Canadian vacationers used VICs during their trip at a similar rate as vacation visitors overall (58%). VIC usage is considerably higher among parties travelling by auto (67%) than among those travelling by air, however, still over half of vacation air parties reported using a VIC (54%). Influenced by proximity and higher rates of repeat visitation, Maritimers (48%) were least likely to use a VIC, while usage was highest among Quebec visitors (73%), followed by Other Canada (60%) and visitors from Ontario (57%).

57% of Canadian vacation travel parties use VICs



Canada Air

54%



Canada Auto

67%

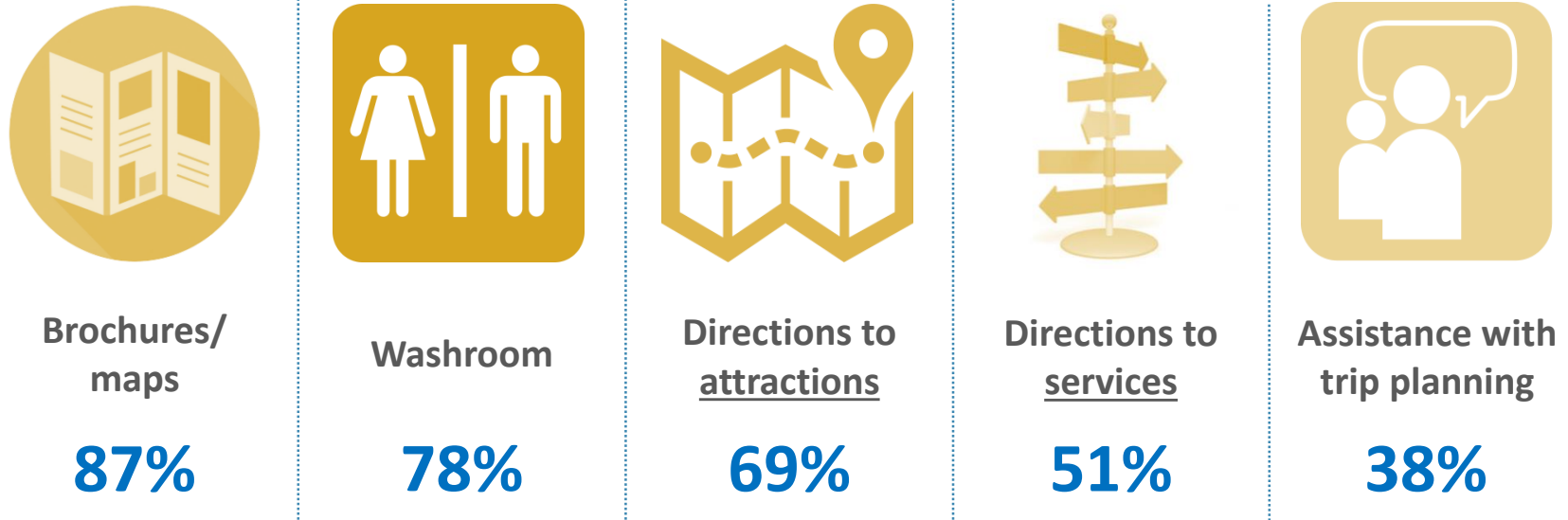


61%

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

Canadian vacationers utilize a range of VIC services during their visit

Chart 20: 2016 Non-Resident Vacation Parties (Canada) – Top 5 Visitor Services Used at Visitor Information Centres (% Parties; May to October)



Canadian 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 Canadian vacation parties obtained brochures and maps at VICs. Over three quarters of these parties used washroom facilities (78%) and two thirds received directions to attractions and sites of interest (69%). 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 18** on page 25), 22% of vacation travellers used a VIC to access Wi-Fi with their own devices and a notable 8% 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, Canadians travelling by auto tend to use these services to a greater extent (see **Table 18**). Canadian 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. 73% of air vacation parties). Furthermore, Canadian auto vacationers were nearly six times as likely as air parties to book accommodations through a VIC (17% vs. 3%). On-site telephone, Wi-Fi and computer use was also much greater among Canadian auto parties.

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

	Vacation	Canada Vacation	Canada Air	Canada Auto
Obtained brochures/maps	88%	88%	86%	91%
Used washroom facilities	76%	78%	73%	87%
Received directions to attractions/sites of interest	67%	69%	70%	66%
Received directions to services/facilities	50%	51%	48%	59%
Received assistance with trip planning	39%	38%	38%	38%
Accessed Wi-Fi to use my own device(s)	23%	22%	17%	31%
Booked accommodations	7%	8%	3%	17%
Used the telephone	5%	5%	2%	11%
Accessed a computer located on site	5%	4%	3%	9%



**Canadian auto vacationers
are almost 6 times more likely
to use a VIC to book
accommodations than those
travelling by air**

VICs play a significant role in enhancing the travel experience of vacation visitors to the province. More than seven in ten vacation parties from Canada 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 Canadian vacationers learnt something during their VIC stop that added to their overall trip experience in Newfoundland and Labrador.

Table 19: 2016 Non-Resident Vacation Parties (Canada) – As a Result of Visiting a VIC, did you ... (% Parties; May to October)

	Vacation	Canada Vacation	Canada Air	Canada Auto
... Learn about an event, activity or area of the province you didn't know about before	71%	71%	73%	67%
... Take part in an activity or event that you wouldn't have taken part in otherwise	44%	44%	46%	40%
... Visit a part of the province that you wouldn't have visited otherwise	30%	29%	29%	30%
... Learn about anything else that added to your travel experience	23%	22%	19%	29%
... Extended your stay in the province	2%	1%	<1%	4%

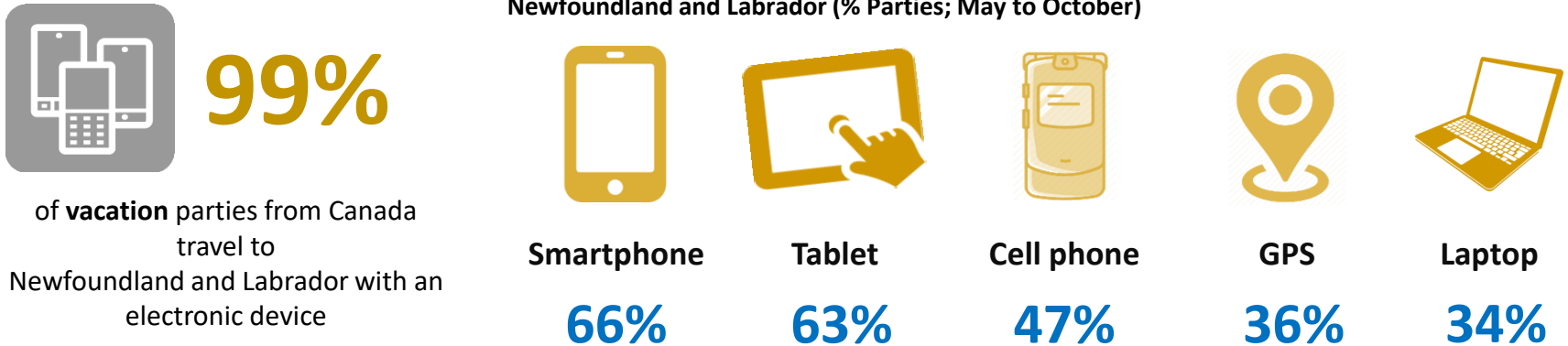
The importance of VIC services can also be seen in the fact that 1% of Canadian vacation parties even extended their stay in the province. This is more common among Canadian auto visitors (4% vs. <1% for air parties) as they are more likely to be able to extend their trips, given the greater degree of flexibility they may have with respect to timing their trip as they may not have finalized their return ferry booking and are not tied to a date to return a rental vehicle.

SHARING EXPERIENCES

Canadian vacation visitors are keen to share their travel experiences in the province

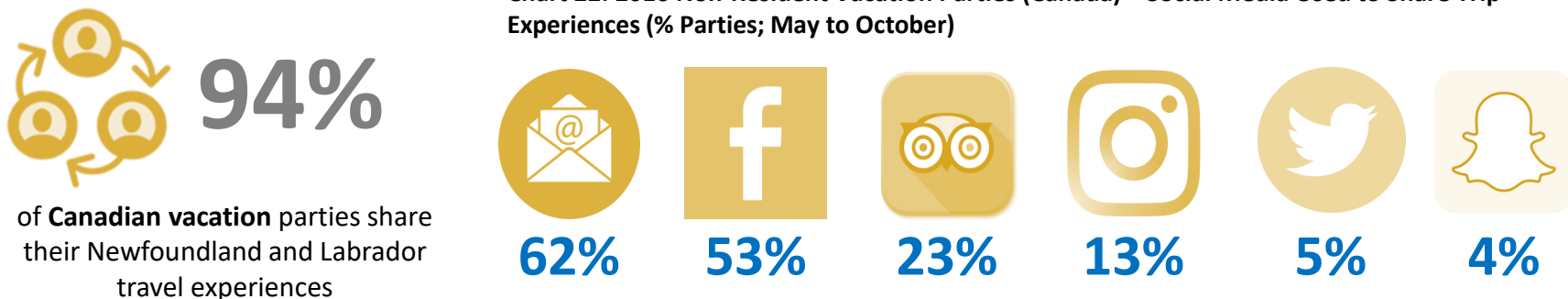
Canadian vacation visitors are staying connected during their trip, with nearly all (99%) reporting that they travel with some type of electronic device. Two thirds of parties (66%) travel with their smartphone, while tablets (63%) are also very common. Despite the widespread popularity of smartphones, traditional cell phones (47%) are also still very prevalent among Canadian vacationers. At 36% and 34% each, GPSs and laptops can be found in many a suitcase as well.

Chart 21: 2016 Non-Resident Vacation Parties (Canada) – Electronic Devices Taken on Trip to Newfoundland and Labrador (% Parties; May to October)



The vast majority of Canadian 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 (53%) are also using Facebook. Canadian visitors use TripAdvisor (23%) and Instagram (13%) to a much smaller extent while Twitter (5%) and Snapchat (4%) are rather uncommon social media platforms used by Canadian vacation visitors to share their vacation experiences.

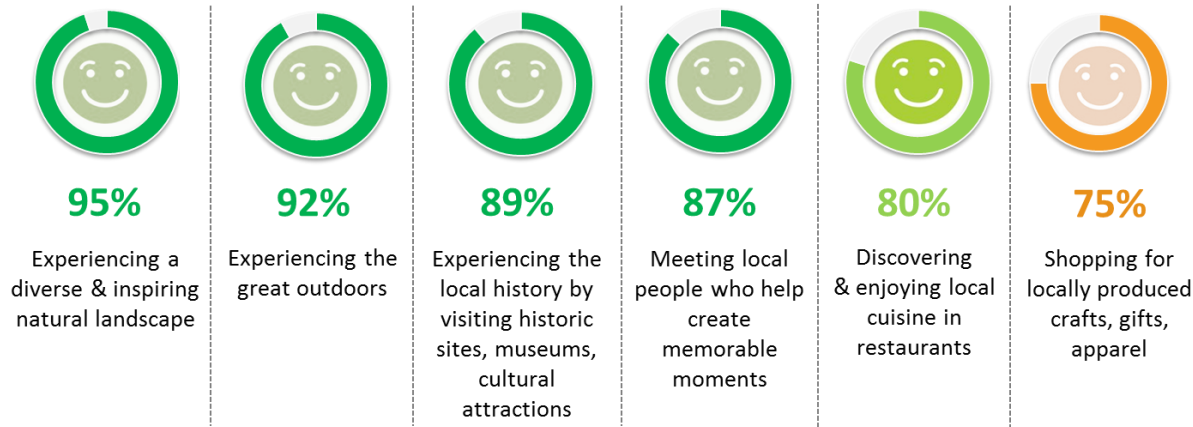
Chart 22: 2016 Non-Resident Vacation Parties (Canada) – Social Media Used to Share Trip Experiences (% Parties; May to October)



TRIP SATISFACTION

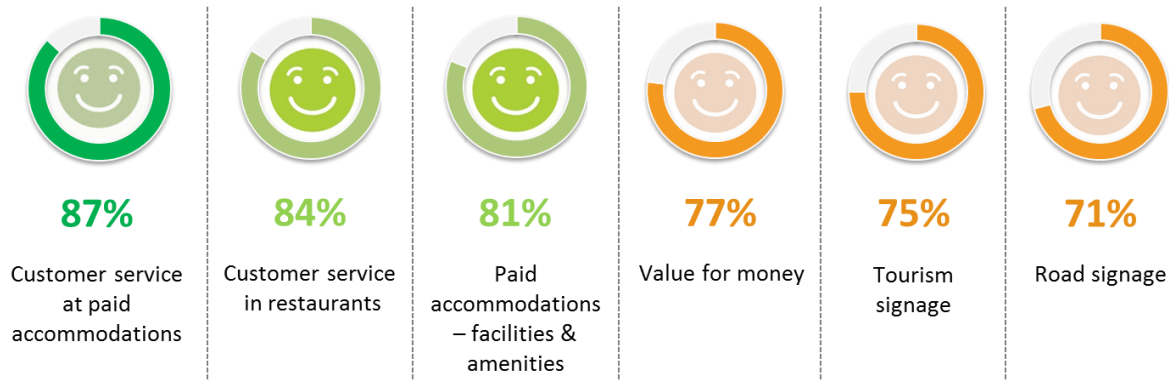
Canadian visitors have highly satisfying vacations in Newfoundland and Labrador

Chart 23: 2016 Non-Resident Vacation Parties (Canada) – Trip Satisfaction with Experiences (% of parties rating 8-10 on a 1-10 point scale; May to October)



Overall, Canadian vacation visitors reported high levels of satisfaction with various aspects of their trip in the province. Canadian 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 (89%) and the opportunity to meet local people who help create memorable moments (87%). Compared to vacationers overall, those from Canada reported higher levels of satisfaction with discovering and enjoying local cuisine in restaurants (80% vs. 78%). Shopping for locally produced crafts and gifts (75%) received lower satisfaction ratings compared to the other experiences.

Chart 24: 2016 Non-Resident Vacation Parties (Canada) – Trip Satisfaction with Services and Facilities (% of parties rating 8-10 on a 1-10 point scale; May to October)

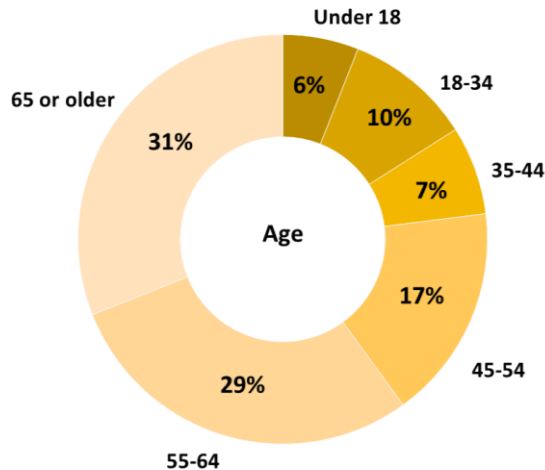


While there is a relatively high level of satisfaction with customer service in restaurants (84%), customer service at paid accommodations is rated considerably higher (87%) than the facilities themselves (81%). Lower levels of satisfaction are noted for tourism signage (75%) and road signage (71%). Seventy-seven percent of Canadian vacation visitors were satisfied with the overall value for money they perceived for their trip.

VISITOR DEMOGRAPHICS

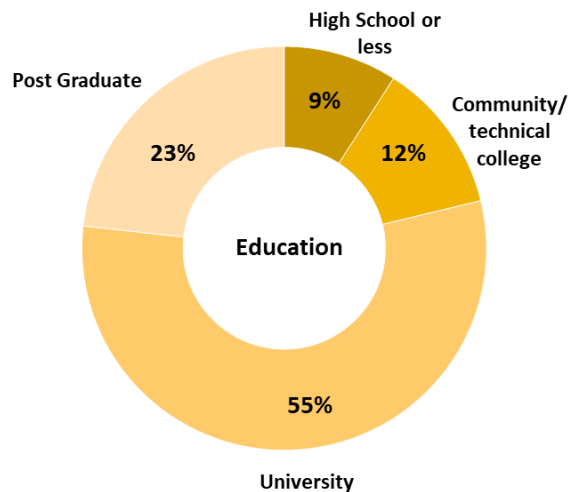
Most Canadian vacationers to Newfoundland and Labrador are 55+, well-educated and affluent

Chart 25: 2016 Non-Resident Vacation Visitors (Canada) – Age (% Visitors; May to October)



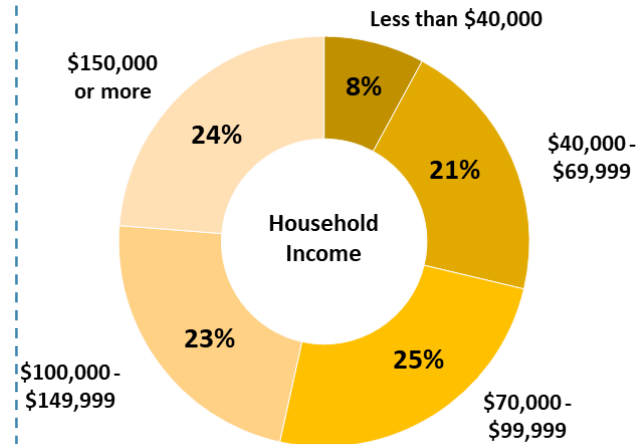
The majority of Canadian vacation visitors are aged 55 or older (60%), and nearly one third are 65 years or older (31%). The share of Canadian visitors 65 years or older has increased notably since 2011 when 27% were 65+. Nearly one in five Canadian visitors is aged 45 to 54 while only 7% are between 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”).

Chart 26: 2016 Non-Resident Vacation Visitors (Canada) – Education (% Visitors; May to October)



Canadian vacation visitors to Newfoundland and Labrador are highly educated, with 23% of visitors holding post-graduate degrees and over half (55%) having graduated university. Less than 10% of vacation visitors indicated a level of education of high school or less while another 12% finished a community or technical college.

Chart 27: 2016 Non-Resident Vacation Visitors (Canada) – Household Income (% Parties; May to October)



Similar to the typical vacation visitor to Newfoundland and Labrador, Canadian visitors are affluent, with close to half (46%) reporting household incomes of greater than \$100,000. This group includes a quarter of travel parties with household incomes of more than \$150,000. Compared to 2011, more Canadian visitors reported household incomes between \$70,000-\$99,999 (25% vs. 20%). Nearly one in three Canadian travel parties indicated household incomes of less than \$70,000, including 8% with less than \$40,000.