

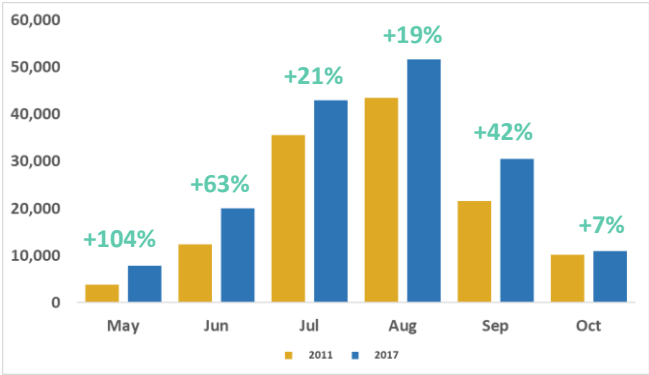
THE SHOULDER SEASON VISITOR

A profile of spring and fall visitors to Newfoundland and Labrador

- Vacation visitation in the May to October period has increased 29% since 2011. There has been significant growth in shoulder season visitation since 2011, with visitation in May, June, and September outgrowing visitation in the high season months of July and August. While just over half of our vacation visitors come in July and August (54%), a significant share (46%) visit in the shoulder season, with a slightly higher share visiting in the fall (September/October) compared to the spring (May/June).
- Fall travellers share many of the characteristics as those travellers who visit in the peak season of July and August. Compared to spring visitors, they are more likely to arrive by air, to travel as couples and tend to be older. They stay slightly longer and spend more during their trip. They are more likely to be visiting for the first time and see Newfoundland and Labrador as a bucket list trip. They are also more heavily engaged in cultural and historical experiences during their stay. Spring visitors, on the other hand, are generally younger, more likely than fall visitors to travel by car and to be repeat visitors. Like all our vacation visitors, spring travellers are most likely to travel as couples but there is also a higher share of solo travel in the spring months. Spring visitors tend to spend less, have shorter stays and are more likely to be drawn to the province by a desire to see nature and wildlife. While they are here, they show higher levels of participation in most outdoor and recreational experiences than fall visitors.

SHOULDER SEASON VISITATION TRENDS

Estimate of vacation visitors (individuals) May to October 2011 and 2017



Total Air and Auto visitors May to October:

2011 – 329,000
2017 – 386,000
+17%

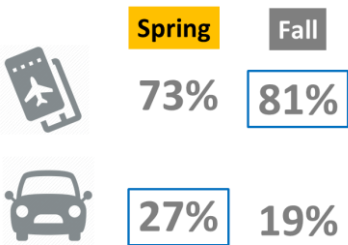
Vacation visitors Air and Auto May to October:

2011 – 127,000
2017 – 164,000
+29%

- Hunting accounts for 10% of vacation visitation in the fall, which impacts some trip characteristics of fall visitors overall

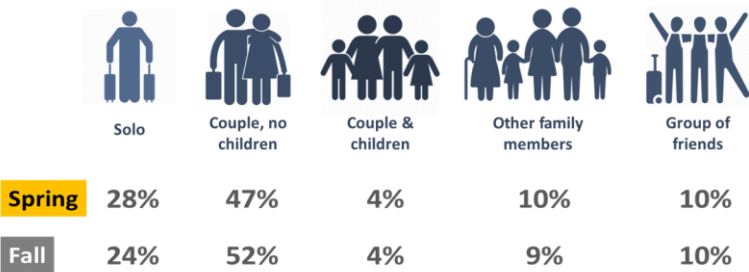
- Between 2011 and 2017, visitation in the shoulder season months has outgrown peak season visitation. Since 2011, visitation in May has increased 104% - five times greater than the growth experienced in July or August. Visitation in June has increased 63% from 2011 to 2017, while September visitation has increased 42%

MODE OF TRAVEL



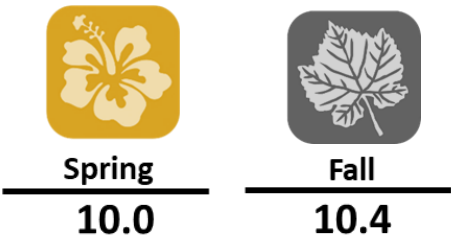
- Air travel dominates regardless of season, with 72% of all vacation visitors travelling to the province by air and 28% travelling by car
- Fall travellers are much more likely to fly (81%) compared to spring visitors (73%). There is a notably higher share of auto travellers in the spring compared to fall

PARTY SIZE & COMPOSITION



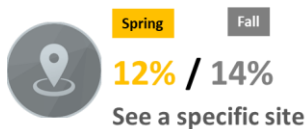
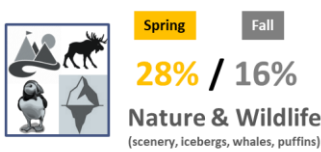
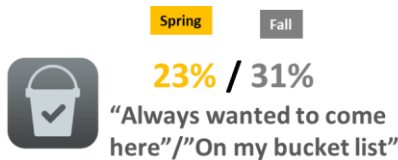
- Spring visitors are more likely to travel solo compared to fall travellers while over half of fall visitors are travelling as couples with no children
- Party size is smaller in the spring, due to the higher share of solo travel during May and June while a higher share of visitors travelling as couples in the fall contributes to a slightly larger party size in September and October

LENGTH OF STAY



- Spring vacationers have slightly shorter stays, averaging 10.0 nights compared to 10.4 nights for fall travelers. Spring travellers are notably more likely to stay 1-7 nights compared to fall visitors (58% vs. 47%).
- Short getaways of 1-3 nights are also more common for spring visitors (18% vs. 12%). Fall vacationers are more likely to have longer stays of 11-21 nights compared to spring visitors (27% vs. 21%)

TRIP MOTIVATORS

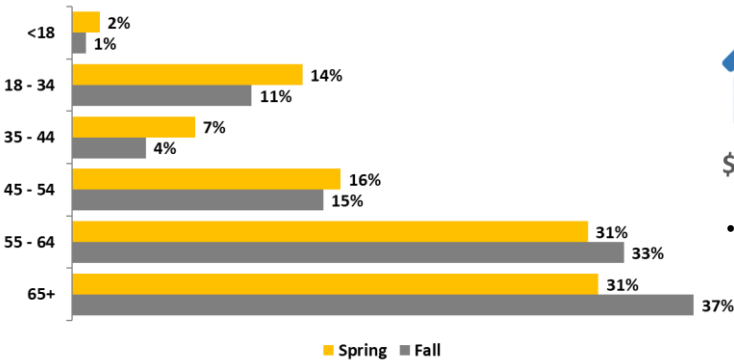


- Spring visitors are notably more likely to mention Gros Morne, L’Anse aux Meadows and Fogo Island as trip motivators compared to fall visitors. Fall visitors are significantly more likely to mention St. John’s and the Fogo Island Inn as trip motivators

- Fall vacationers are more likely to be motivated to visit Newfoundland and Labrador by a strong desire to see the province – 31% say NL is a bucket list trip
- At 28%, a desire to experience the province’s nature and wildlife is the top factor which influenced spring travellers to spend their vacation in Newfoundland and Labrador

DEMOGRAPHICS

Non-resident Visitors by Age (% Visitors; May to October)



Spring

22%

23% \$40-69.9k

Fall

26%

18% \$40-69.9k

- Fall vacationers tend to have higher household incomes – 26% earn \$150,000 or more vs. 22% among spring travellers. Both fall and spring visitors are highly educated, with fall visitors being *slightly* more likely to have post-secondary education
- Spring vacationers are younger – 21% are 18-44 (vs. 15% of fall travellers). Fall vacationers tend to be older – 69% are 55 or older (vs. 62% of spring travellers), including 37% who are 65 or older (vs. 31% of spring travellers)

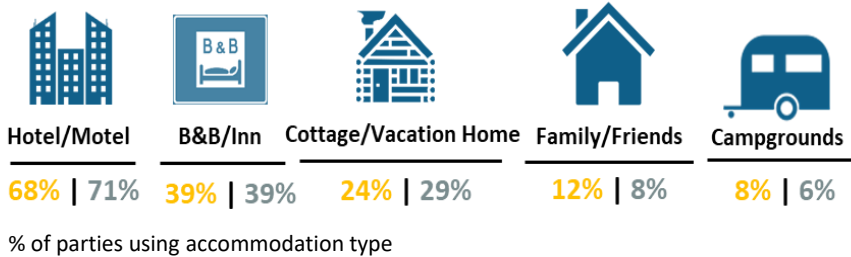
SPENDING



- Fall vacationers are bigger spenders, averaging \$3,308 per party vs. \$2,768 for spring visitors
- With spending by hunters included, fall travellers spend on average \$3,664 per party

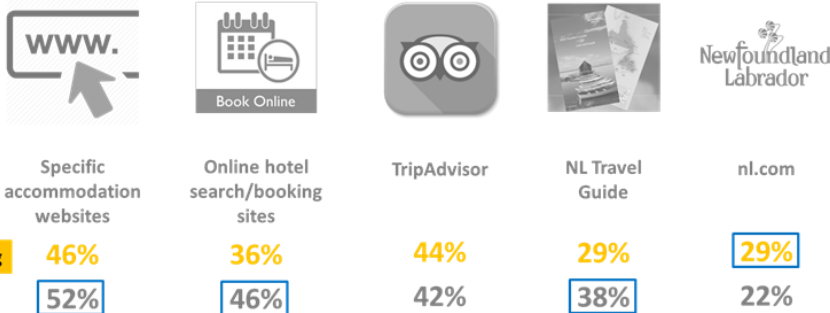
*Fall spending figures exclude spending by those visiting for hunting

ACCOMMODATIONS



- Fall vacationers are slightly more likely to stay in hotels/motels, cottages/vacation homes and outfitting camps
- Spring travellers are more likely to stay with family and friends, in campgrounds, and in hostels compared to fall vacationers

Top sources to find accommodations (% of parties)



- When selecting accommodations, fall visitors are more likely to turn to websites of specific accommodations, online hotel search sites and the NL Traveller’s Guide
- Spring travellers show a preference for Trip Advisor as well as the provincial tourism website, newfoundlandlabrador.com

REGIONAL VISITATION

Regional Visitation by Season (% parties; overnight and same-day visits)

Spring

Fall

ST. JOHN'S

78% | 78%

AVALON

57% | 54%

EASTERN

50% | 50%

CENTRAL

52% | 49%

WESTERN

52% | 55%

LABRADOR

9% | 10%

- Likely influenced by the opportunity to see icebergs, spring vacationers report higher levels of visitation to the Central (52% vs. 49%) and Avalon (57% vs. 54%) regions compared to fall visitors. Fall vacationers were more likely than spring visitors to visit the Western region (55% vs. 52%), influenced by the need to see Gros Morne and L'Anse aux Meadows – must-sees on their Newfoundland and Labrador bucket list

OUTDOOR EXPERIENCES

Top 5 outdoor activities visitors participate in (Spring; % of parties)



Pleasure walking
91%



Hiking
80%



Iceberg viewing
79%



Seabird watching
55%



Wildlife viewing
51%

Top 5 outdoor activities visitors participate in (Fall; % of parties)



Pleasure walking
88%



Hiking
76%



Visiting National Parks
54%



Parks, Nature Parks/Reserves
46%



Wildlife viewing
43%

- Spring vacationers engage in outdoor activities and experiences to a greater extent than fall travellers. Iceberg viewing and seabird watching are top 5 activities for spring travellers, while fall travellers take the opportunity to visit National Parks as well as other parks, including nature parks and ecological reserves

CULTURAL EXPERIENCES

Top 5 culture and heritage experiences (Spring; % of parties)



Exploring small communities
70%



Lighthouse experiences
68%



Historic Sites/museums
68%



Culinary experiences
67%



Galleries, exhibits
44%

Top 5 culture and heritage experiences (Fall; % of parties)



Historic Sites/museums
79%



Exploring small communities
75%



Lighthouse experiences
75%



Culinary experiences
71%



Galleries, exhibits
55%

- Fall travellers engage in cultural/heritage experiences to a greater extent than spring travellers – history, culture and food are key. Historic sites are the top cultural attraction for fall vacationers (79% visited historic sites and museums compared to 68% of spring vacationers)

TRIP PLANNING

Top Sources - Before Trip

Spring

Fall



Destination Websites

79% | 72%



Local Accommodation Websites

77% | 69%



Attraction/Activity Websites

75% | 69%



Provincial Tourism Website – nl.com

76% | 66%



Review Websites

69% | 55%



4.1
months in
advance



5.1
months in
advance

Top Sources - During Trip



Local Service Personnel

73% | 69%



Local Residents

71% | 71%



Print Brochures

66% | 69%



NL Travel Guide

63% | 64%



Destination Websites

62% | 58%

- Spring travellers use a range of online sources more than fall visitors when planning before their trip and rely on destination websites, local accommodation websites, attraction/activity websites, newfoundlandlabrador.com and review sites. In-destination, fall visitors are more likely to use printed materials and VICs

- Fall vacationers take more time to plan – on average, they begin planning 5.1 months in advance while spring vacationers plan 4.1 months ahead of their vacation trip
- Spring visitors use various planning resources to a greater extent compared to fall visitors despite taking less time to plan trip overall