

2016 EXIT SURVEY PROFILE OF INTERNATIONAL VACATION VISITORS



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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 International Vacation Visitors* focus on the peak travel season May to October and exclude visitors from the United States which are covered in a separate profile.

INTERNATIONAL VACATION VISITOR ORIGIN

International visitors account for 6% of vacation visitation to the province

This profile of the **international vacation visitor** focuses on non-residents from overseas countries who visited Newfoundland and Labrador for vacation during the peak travel season of May to October. It is estimated that a total of **4,537 non-resident vacation travel parties** visited Newfoundland and Labrador during the May to October period, representing a total of 8,908 visitors.

Chart 1 shows the origin of visitors who come to the province for vacation. International visitors make up 6% of all vacation visitors to Newfoundland and Labrador, making it the third largest source market for visitors after Canada and the United States.

Chart 2 shows the origin of international vacation visitors. Residents of the United Kingdom (UK) and Germany account for half of all international vacation visitors to the province. The UK is the province's largest overseas market, representing 32% of *international* vacation visitors and 2.1% of *overall* vacation visitation. At 18%, Germany accounts for the second largest share of international vacationers to the province, representing 1.2% of overall vacation visitation. About 1 in 10 international vacation visitors are from Australia, representing just under 1% of overall vacation visitation. About 1 in 10 international vacation visitors are from Australia, representing just under 1% of overall vacation visitation.

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

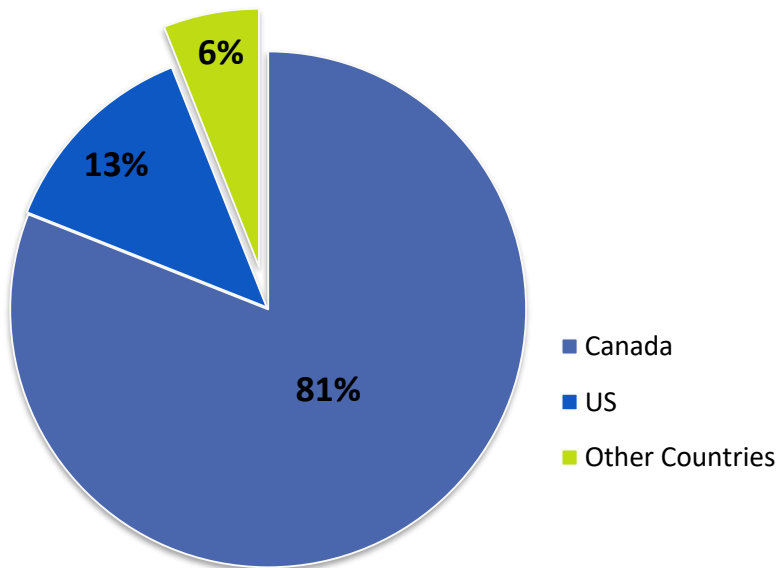
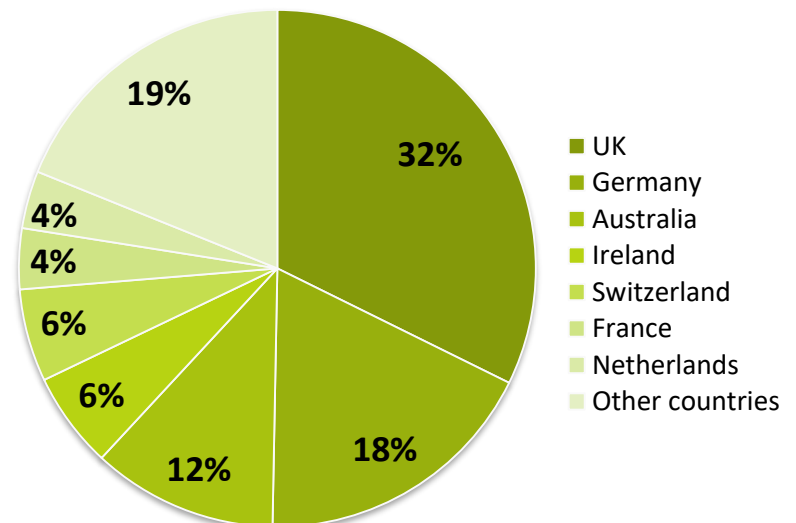


Chart 2: 2016 Non-Resident Vacation Parties (International) – Country of Origin (% Parties; May to October)



PARTY SIZE

The average international vacation travel party size is 2.0



All Vacation

2.2



International

2.0



UK

2.0



Germany

1.9

The average party size of international vacation visitors was **2.0** individuals, slightly smaller than that of vacation visitors overall. Vacation travel parties from the UK have a party size of 2.0, while German vacationers have a slightly smaller party size of 1.9.

PARTY COMPOSITION

Nearly half of international vacationers visit Newfoundland and Labrador as couples

Similar to vacation visitors overall, about half (48%) of international vacation parties travel as couples with no children. International vacationers are more likely than other vacation visitors to travel solo (28% vs. 21%). Close to 1 in 10 travel with a group of friends, while another 8% travel as couple(s) with children. Travellers from overseas are less likely than other vacation visitors to be visiting the province with other family members (7% vs. 12%). Travellers from the UK are more likely to be visiting the province as couples with no children (55%) compared to German visitors (49%). German travellers are more likely to be visiting the province solo (29%) than are fellow visitors from the UK (24%).

Chart 3: 2016 Non-Resident Vacation Parties (International) – Party Composition (% Parties, May to October)



Couple(s),
no children

48%



Solo

28%



Group of
friends

9%



Couple(s),
with children

8%



Other Family
members

7%

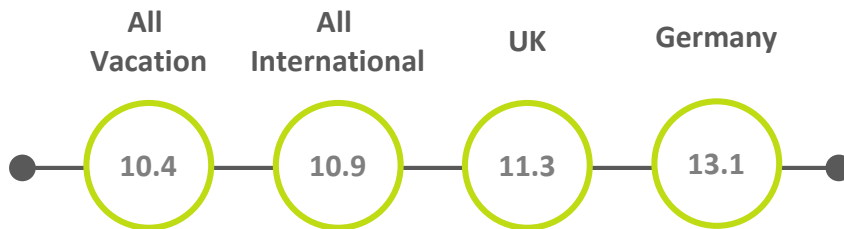
Table 2: 2016 Non-Resident Vacation Parties (International) – Party Composition (% Parties, May to October)

Party Composition	Vacation	International Vacation
Solo	21%	28%
Couple(s), no children	51%	48%
Couple(s), with children	7%	8%
Other family	12%	7%
Group of friends	8%	9%
Business Associates	<1%	<1%

LENGTH OF STAY

International vacation visitors spend 10.9 nights in the province on average

Chart 4: 2016 Non-Resident Vacation Parties – Average Length of Stay by Origin (Nights; May to October)



At 10.9 nights, international vacation visitors average longer stays in the province than vacation visitors overall. German travellers tend to stay even longer, averaging 13.1 nights in Newfoundland and Labrador, while UK visitors stay 11.3 nights.

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

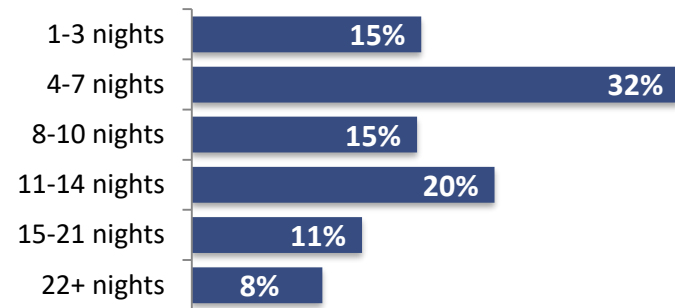


Chart 5 highlights the length of stay of international vacationers by the number of nights. A significant share of international vacation visitors (46%) opt for shorter stays of a week or less, on par with vacation visitors overall. Slightly fewer international visitors stay 8 to 10 nights compared to other vacationers, but a higher share have longer stays of 15 to 21 nights and 22+ nights in the province.

FIRST TIME & REPEAT VISITORS

Three quarters of international vacationers are visiting for the first time

Table 3: 2016 Non-Resident Vacation Parties (International) – Repeat and First Time Visitors, Primary Trip Destination (% Parties; May to October)

	Vacation	International Vacation
Repeat	35%	25%
First time	65%	75%
NL primary destination	88%	61%

Table 3 shows the rates of repeat and first time visitation for international vacation travel parties to the province. Compared to vacation visitors overall, international visitors are significantly more likely to be visiting the province for the first time (75% vs. 65%). Only one quarter of international vacationers have visited the province before. International vacation visitors (61%) are also much less likely to report that the province was their primary destination than vacation visitors in general (88%).

EXPENDITURES

International vacation visitors spend \$3,446 per trip on average

Table 4: 2016 Non-Resident Vacation Parties (International) – Average Expenditures (May to October)

	Vacation	International Vacation
Average Spend per Party	\$3,470	\$3,446
Average Spend per Person	\$1,681	\$1,815
Average Spend / Person / Night	\$200	\$179

Chart 6: 2016 Non-Resident Vacation Parties (Canada) – Average Per Party Expenditure by Origin (May to October)

ALL VACATIONERS	INTERNATIONAL	CANADA	US
\$3,470	\$3,446	\$3,417	\$3,818

Table 5: 2016 Non-Resident Vacation Parties (International) – Per Party Expenditure Patterns (May to October)

Expenditure Type	Vacation	International Vacation
Accommodations	43%	43%
Restaurants	21%	19%
Transportation	17%	19%
Activities, Experiences	7%	7%
Arts, Crafts, Souvenirs	6%	4%
Groceries	5%	6%
Other	2%	1%

Spending by non-resident visitors is a function of trip purpose, length of stay as well as party size. As shown in **Chart 6**, at \$3,446 international vacation visitors reported slightly lower per party spending than vacation visitors overall. International visitors vacationing in the province for the first time spent more, averaging \$3,539 during their stay.

Compared to other markets, international vacationers averaged a similar spend as Canadian vacation visitors (\$3,446 vs. \$3,417) but spent notably less on average than US vacation visitors (\$3,446 vs. \$3,818). Compared to other vacation visitors, international vacation visitors spent more per person at \$1,815 but less on a per person per night basis at \$179.

\$3,539

*International
first time visitor party
spending*

Spending can be attributed to a variety of categories, with accommodations accounting for 43% of the dollars spent by international vacation travel parties, the same share spent by vacation visitors overall. International vacationers spent an additional 19% each of their money in restaurants and 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.

Activities and experiences account for 7% of expenditures, followed by spending on arts, crafts and souvenirs and store-bought food and beverages which account for 4% and 6% respectively.

ACCOMMODATIONS

International vacationers spent a third of their nights in the province in hotels/motels, one-quarter in B&Bs

Overall, 96% of international vacation visitors stayed in paid accommodations, resulting in 86% of nights in the province being spent in some type of paid accommodation.

As is the case for all vacation visitors to the province, hotels and motels are the most popular form of accommodation for international vacation visitors, with 75% staying in hotels/motels and 34% of nights in the province being spent there. Bed & Breakfasts/Inns are the second most popular among international visitors with almost half (47%) of visitors staying in this type of accommodation, accounting for 26% of nights. Twenty percent of overseas vacationers reported staying in commercial cottages/cabins, with 8% of total nights in the province spent in these types of accommodations.

Twelve percent of international visitors stayed in rented vacation homes, accounting for 5% of total nights. Campgrounds are also relatively popular, with 8% of international visitors staying in provincial, national or commercial campgrounds, accounting for 6% of nights in the province.

Only 4% of international vacationers stayed in their own homes and residences while in the province, however, these stays accounted for 12% of total nights spent in the province – the third largest share among all types of accommodation.

Table 6: 2016 Non-Resident Vacation Parties (International) – Share of Party Nights by Type of Accommodation (% Nights; May to October)

Accommodation Type	Vacation	International Vacation
Hotel/Motel	37%	34%
B&B/Country Inns	20%	26%
Commercial Cabins/Cottages	8%	8%
Rented Vacation Home	6%	5%
Apartment/room in private home (not owned by relative/friend)	3%	4%
Campgrounds – All Types	8%	6%
Commercial Outfitting Camps	2%	1%
Houses/Cabins of Relatives/Friends	8%	1%
Own Home/Residence	7%	12%
All Other Types of Accommodation	3%	3%

Chart 7: 2016 Non-Resident Vacation Parties (International) – Share of Parties Using Type of Accommodation (% Parties; May to October)



OVERNIGHT DESTINATIONS

St. John's and the Clarenville/Bonavista area are most popular with international visitors

Table 7: 2016 Non-Resident Vacation Parties (International) – Areas of Province Visited and Stayed at Least One Overnight (% Parties; May to October)

Economic Zone	Vacation	International Vacation
Zone 1: Rigolet to Nain	0.0%	0.0%
Zone 2: Labrador West/Churchill Falls	0.3%	2.9%
Zone 3: Happy Valley/Goose Bay/Northwest River	1.7%	2.7%
Zone 4: Mary's Harbour to Cartwright	0.9%	4.4%
Zone 5: Labrador Straits (L'Anse Au Clair to Red Bay)	6.0%	7.6%
Zone 6: Viking Trail, St. Anthony South West to Plum Point, East to Roddickton/Englee	23.3%	19.3%
Zone 7: Gros Morne Area, Viking Trail North to and including Plum Point	45.2%	44.3%
Zone 8: Deer Lake/Humber Area	18.8%	9.6%
Corner Brook/Massey Drive	14.5%	6.6%
Zone 9: Stephenville/Port-au-Port/Burgeo	4.2%	1.4%
Zone 10: Port-aux-Basques/Doyles/Rose Blanche	10.4%	7.3%
Zone 11: Baie Verte/La Scie/Green Bay	5.3%	12.0%
Zone 12: Grand Falls Windsor Area	10.4%	5.9%
Zone 13: Bay D'Espoir Area	0.3%	0.0%
Zone 14: Gander/Twillingate East to Terra Nova	42.6%	42.2%
Zone 15: Clarenville/Bonavista Peninsula Area	37.6%	49.5%
Zone 16: Burin Peninsula	3.4%	5.2%
Zone 17: North West Avalon	9.0%	17.2%
Zone 18: Argentia/Placentia Area	3.9%	10.9%
Zone 19: North East Avalon (Excluding St. John's)	4.6%	4.1%
St. John's	71.6%	81.3%
Zone 20: Southern Shore Area	7.9%	15.9%

The top overnight destinations for international vacationers are St. John's, the Clarenville/Bonavista Peninsula area, the Gros Morne region and the Gander/Twillingate area. St. John's was more popular for overnight stays among international visitors, with over 80% of these parties staying here compared to 72% of vacation visitors overall. They were also more likely to stay in the Clarenville/Bonavista Peninsula area, with half of international visitors overnighing here. Forty-four percent stayed overnight in the Gros Morne area and 42% in the Gander/Twillingate region.

The areas of Newfoundland and Labrador visited by vacationers are greatly influenced by how they travel to the province. The vast majority of international visitors arrive in the province by air and, compared to vacation visitors overall, are more likely to overnight in areas on the Avalon Peninsula and in the Eastern Region. International vacation parties were more likely to spend a night in the North West Avalon, the Argentia/Placentia area, and along the Southern Shore compared to other vacation visitors. They were also more likely than vacation visitors overall to visit and stay overnight in Labrador.

REGIONAL DESTINATIONS

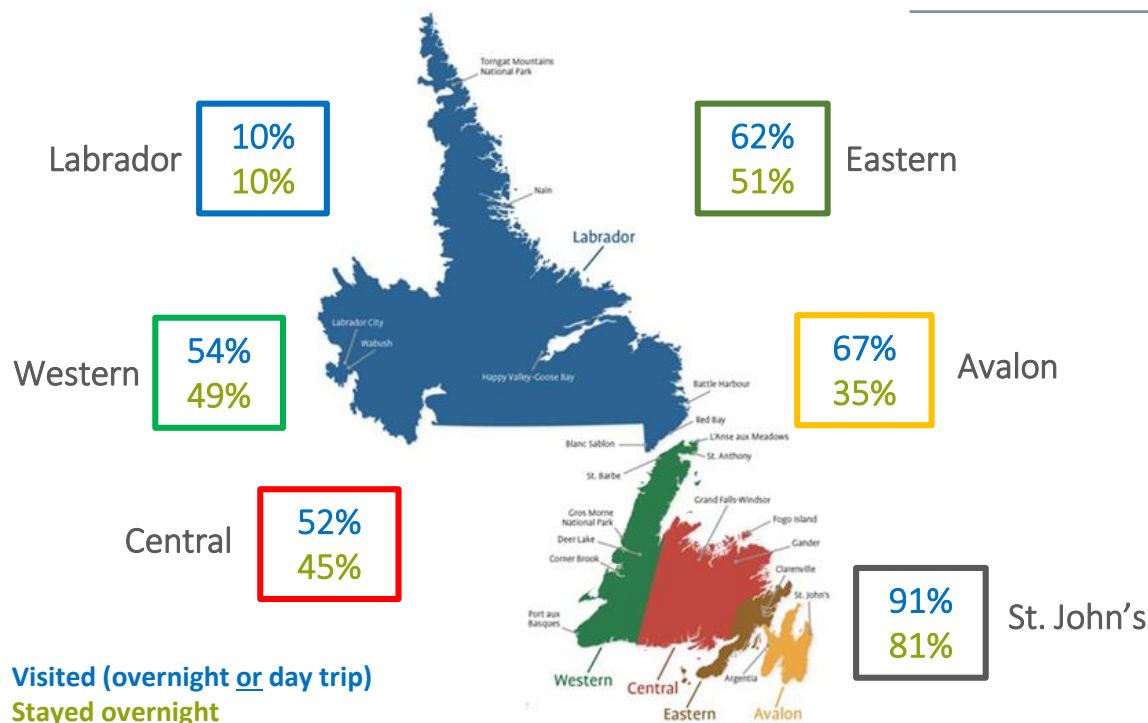
International vacationers explore all regions of Newfoundland and Labrador

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 in a region without staying overnight in that particular region. The total share of international vacationers to a region – regardless of whether they stayed overnight or not – is shown in **Chart 8**.

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

Table 8: 2016 Non-Resident Vacation Parties (International) – Areas of Province Visited (% Parties; May to October)

Region	Vacation	International Vacation
St. John's Area	78%	91%
Avalon Peninsula	57%	67%
Eastern Region	54%	62%
Central Region	55%	52%
Western Region	62%	54%
Labrador	10%	10%



International vacation visitors were more likely than vacation visitors overall to have visited the St. John's area, the Avalon Peninsula, and the Eastern region. Nine in ten international vacation parties (91%) visited St. John's, while two-thirds of them visited the Avalon Region. Six in ten international vacation parties visited the Eastern region. Just over half of international travellers visited each of the Central (52%) and Western regions (54%), while Labrador attracted 10% of international visitors.

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

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

International vacation visitors who visited the St. John's area were most likely to visit the Downtown area (96%), followed by Signal Hill (86%), Cape Spear (71%) and Quidi Vidi Village (64%). International vacationers visiting the Avalon region took in Cape St. Mary's (36%), the Witless Bay Ecological Reserve (34%), the Colony of Avalon at Ferryland (34%), and the East Coast Trail (27%). Popular attractions and communities among international visitors to the Eastern region include Trinity (75%), Bonavista (66%), Cape Bonavista (56%), and Elliston (49%).

Among the vacationers who visited the Central region, common stops included Twillingate (83%), Terra Nova National Park (62%), various regional hiking and walking trails (57%) and Gander (34%). In the Western region, the most visited attraction among international vacation visitors was Gros Morne National Park (96%), followed by regional hiking and walking trails (80%), Western Brook Pond (66%), and L'Anse aux Meadows (44%). International vacationers visiting Labrador were most likely to stop at Red Bay (89%) and other southern Labrador communities, with the Labrador Coastal Drive (65%) and regional hiking and walking trails (53%) rounding out the top regional attractions.

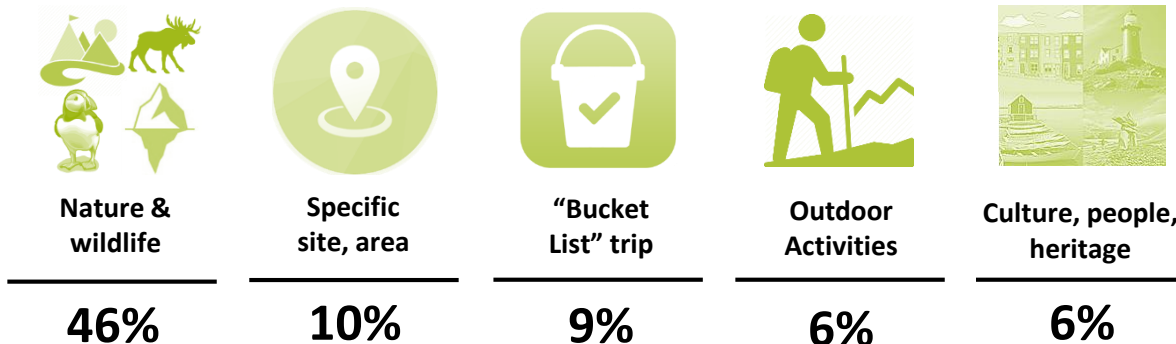
TRIP MOTIVATORS

Nature and wildlife are primary trip motivators for international vacationers

Nearly half (46%) of international visitors to the province say that experiencing Newfoundland and Labrador's natural environment and wildlife was their primary reason for choosing to vacation in the province. Compared to vacation visitors overall, those from overseas are more than twice as likely (46% vs. 21%) to cite our natural environment, landscapes, icebergs, whales, puffins and other wildlife as trip motivators, with icebergs being a particularly strong motivator. While wanting to experience our nature and wildlife is the main trip motivator, the desire to see specific areas or sites in the province also motivates 10% of international travellers to come and visit. When it comes to specific sites, wanting to experience the East Coast Trail, Gros Morne and St. John's top international visitors' list.

Nearly 1 in 10 international vacationers (9%) say they that Newfoundland and Labrador is a bucket list trip, a significantly smaller share than among vacation visitors overall (9% vs. 27%). The opportunity to take part in outdoor activities such as hiking, camping, sightseeing and photography are motivators for 6% of international vacationers while the same share of 6% cite our culture, history, heritage, people and uniqueness as motivating them to visit. Previous travel experiences in the province as well as hearing or reading about Newfoundland and Labrador in books, magazines, TV shows or movies were also mentioned by about 5% of international visitors as motivating them to vacation in the province.

Chart 10: 2016 Non-Resident Vacation Parties (International) – Most Cited Trip Motivators
(% Parties, May to October)



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

East Coast Trail

Gros Morne

St. John's

Trans Labrador Highway

National Parks

Twillingate

L'Anse aux Meadows

ACTIVITIES & EXPERIENCES

Strolling around communities and hiking are top activities for international vacationers

Chart 11: 2016 Non-Resident Vacation Parties (International) – Top Outdoor/Recreational Experiences (% Parties; May to October)



Pleasure
walking

87%



Hiking

82%



Seabird
watching

66%



Visiting National
Parks

58%



Iceberg viewing

53%

With nature and wildlife motivating nearly half of international visitors to vacation in Newfoundland and Labrador, it is not a surprise that they are keen to take advantage of the many outdoor experiences the province has to offer. Visitors from overseas take part in many outdoor activities at a higher rate than vacation visitors overall (see **Table 9**), with pleasure walking in/around communities (87%) and hiking/walking on trails (82%) 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. Nearly 70% of international vacationers go seabird watching while almost 6 in 10 visit the province's four national parks. More than half of international vacationers view iceberg (53%) during their visit, realizing one of the top experiences that drew them to vacation in Newfoundland and Labrador in the first place. Other popular activities include visiting other parks such as nature parks and ecological reserves, wildlife viewing, whale watching and taking in sightseeing boat tours.

Table 9: 2016 Non-Resident Vacation Parties (International) – Participation in Outdoor/Recreational Experiences (% Parties; May to October)

	Vacation	International Vacation
Pleasure walking in/around communities	89%	87%
Hiking/walking on trails	79%	82%
Visited a National Park (Gros Morne, Terra Nova, Torngat Mountains, Mealy Mountains)	59%	58%
Seabird watching (e.g. puffins, gannets, murre)	55%	66%
Whale Watching	52%	52%
Sightseeing boat tour	49%	48%
Visited other parks, including nature parks and ecological reserves	47%	55%
Wildlife viewing	46%	53%
Iceberg viewing	44%	53%
Other bird watching	30%	36%
Geological tour/fossil observation	29%	31%
Botanical garden/plant observation	22%	22%
Ocean fishing	6%	5%
Canoeing/kayaking/rafting	6%	5%
All-terrain/Utility Vehicle (ATV/UTV) Touring	4%	7%
Angling (fresh water)	4%	4%
Golfing	3%	3%
Mountain biking/cycling	3%	6%
Hunting (big game – bear, moose, caribou)	2%	0%
Hunting (small game – hare, grouse)	<1%	0%

International vacation visitors take in lighthouses, historic sites and culinary experiences

Chart 12: 2016 Non-Resident Vacation Parties (International) – Top Cultural and Heritage Experiences (% Parties; May to October)



**Lighthouse
experiences**

78%



**Historic Sites,
museums**

76%



**Culinary
experiences**

67%



**Exploring small
communities**

61%



**Galleries,
exhibits**

43%

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 overseas showed lower levels of participation in nearly all cultural and heritage experiences but still engaged at significant rates. The top cultural experience for international vacationers is exploring the nature and history involving the province's lighthouses (78%). Just over three quarters (76%) took in historic sites, museums and interpretation centres, making these attractions an essential component of a visitors' journey through our province. Two-thirds (67%) of overseas vacationers experienced local cuisine during their visit and 6 in 10 international travellers also reported experiencing our culture, heritage and meeting locals while exploring our communities (61%). Just over 40% of our international travellers visited galleries or exhibits, providing them with an immersive experience of the varied aspects of our culture and heritage.

Table 10: 2016 Non-Resident Vacation Parties (International) – Participation in Cultural/Heritage Experiences (% Parties; May to October)

	Vacation	International Vacation
Historic sites/museums/interpretation centres	78%	76%
Explored small/rural communities	76%	61%
Experienced nature/history at or around a lighthouse	74%	78%
Local cuisine/culinary experiences	70%	67%
Galleries/exhibits	50%	43%
Went to a local pub for a live performance	45%	42%
Archeological sites (interpretative tour/hands-on dig)	28%	24%
Theatre plays/other live performances	24%	17%
Experienced aboriginal culture/traditions/history	17%	20%
Participated in a special program at an attraction	15%	12%
Watched/participated in creating arts/crafts	9%	11%

Table 11: 2016 Non-Resident Vacation Parties (International) – Participation in Festivals and Events (% Parties; May to October)

	Vacation	International Vacation
Participated in a local/community event	15%	7%
Attended a music festival/event	14%	13%
Attended a food/drink-themed festival	6%	2%
Attended/participated in a sports event/tournament	2%	2%
Overall participation in a festival or event	29%	19%

Table 11 shows levels of participation in various types of festivals and events. Overall, at 19%, international vacation visitors reported significantly lower levels of participation in festivals and events than vacation visitors overall (29%). Those who did were most likely to attend a music festival or event (13%) while at 7%, a much smaller share participated in a local or community event.

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

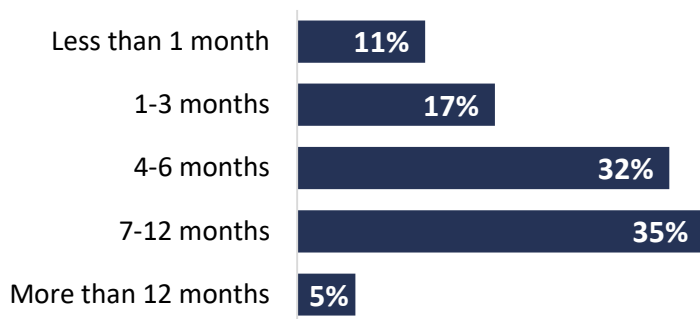


Gros Morne
Theatre Festival

TRIP PLANNING

On average, international vacation visitors plan their trip to the province nearly 6 months in advance

Chart 13: 2016 Non-Resident Vacation Parties (International) – Trip Planning Horizon (% Parties; May to October)



It takes time to plan a vacation and our international visitors are no exception. These visitors begin planning their trip, on average, about 5.8 months in advance of travel, taking longer than visitors from most other markets. One third (32%) of international vacationers need 4 to 6 months of planning time while 17% take only 1 to 3 months. International vacation visitors are much more likely than other vacation visitors to plan 7 to 12 months ahead whereas only 1 in 10 travellers plan for less than one month prior to their trip.

Chart 14: 2016 Non-Resident Vacation Parties (International) – Planning Sources Used Before and During Vacation Trip (% Parties; May to October)

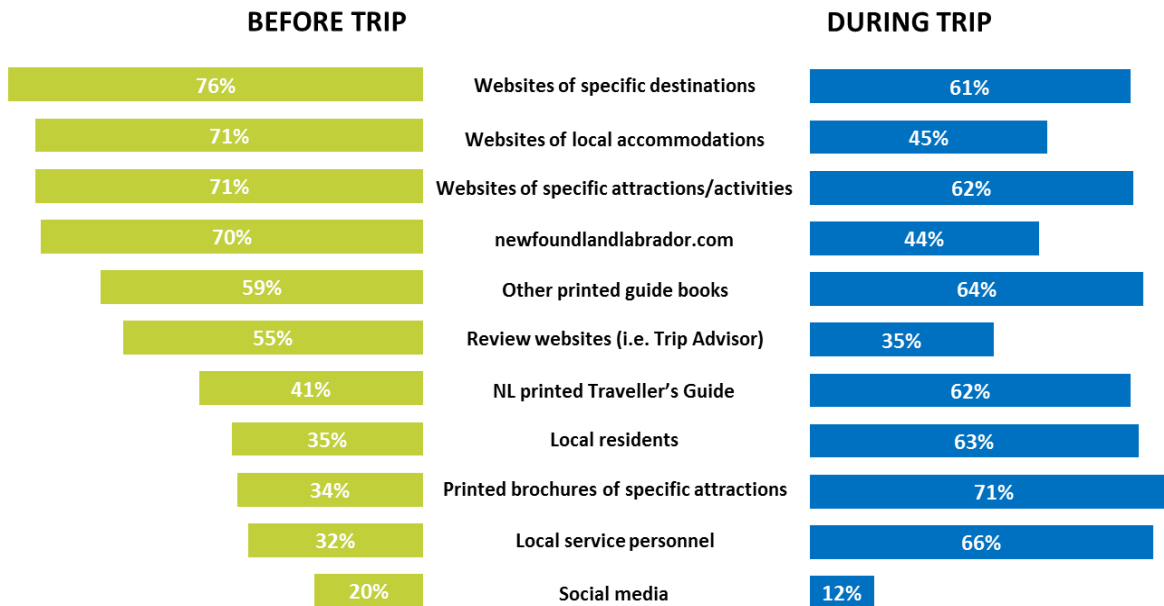
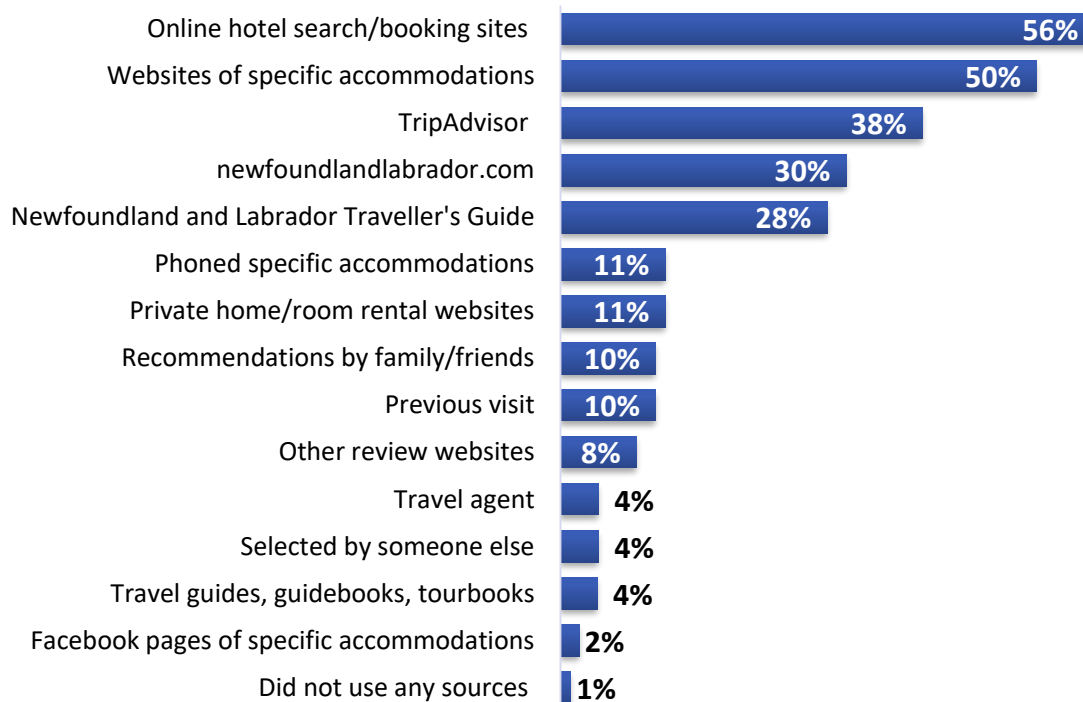


Chart 14 shows the various travel planning sources used by international vacationers before and during their trip. When planning prior to their trip, these visitors rely most heavily on web-based sources, with destination websites (76%), local accommodation websites (71%), websites of specific attractions/activities (71%), and newfoundlandlabrador.com (70%) being the most popular trip planning resources. Other printed guide books are more popular with international vacation visitors than for vacationers overall, with 59% compared to 49% of parties using this source prior to travel. While travelling in the province, international visitors still utilize web-based resources, however, printed materials such as attraction brochures (71%), the NL Traveller's Guide (62%) and other printed guide books (64%) play an essential role in helping them plan their trip while here. These sources are complemented by local residents (63%) and service personnel (66%).

Chart 15: 2016 Non-Resident Vacation Parties (International) – Sources Used to Select Paid Accommodations (% Parties; May to October)



When it comes to accommodations planning, online resources dominate. Online hotel search and booking sites are more popular among international vacationers with over half (56%) using them when choosing accommodations. Websites of specific accommodations (50%) and TripAdvisor (38%) are also relatively widely used, while the provincial tourism website newfoundlandlabrador.com (30%) and the NL Traveller's Guide (28%) round out the top five sources among overseas visitors.

Phoning specific accommodations (11%), private home/room rental sites (11%), and receiving recommendations from family/friends (10%) were equally popular among international vacationers when selecting where to stay during their trip. Experience from a previous visit was also helpful for 1 in 10 international visitors.

VISITOR INFORMATION CENTRES

Nearly 7 in 10 international vacationer visitors used a Visitor Information Centre

At 68%, international vacationers were significantly more likely to use VICs during their trip compared to vacationers overall (58%). At 73%, international vacationers visiting Newfoundland and Labrador for the first time were even more likely to stop at a VIC.



68% of International vacationers use VICs



73%

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

International vacationers utilize a range of VIC services during their visit

Chart 16: 2016 Non-Resident Vacation Parties (International) – Top 5 Visitor Services Used at Visitor Information Centres (% Parties; May to October)



**Brochures/
maps**

85%



Washroom

58%



**Directions to
attractions**

56%



**Assistance with
trip planning**

44%



**Directions to
services**

41%

Like all vacationers, those from overseas 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, 85% of international vacationers obtained brochures and maps at VICs. Nearly 60% used washroom facilities at the VICs, however, compared to vacationers overall, they were much less likely to do so (58% vs. 76%). Fifty six percent received directions to attractions and sites of interest and close to half (44%) received assistance with trip planning. Four in ten overseas vacation parties used the VICs to get directions to specific services or facilities. In terms of other services (see **Table 12**), at 30%, international visitors were more likely to have used a VIC to access Wi-Fi with their own devices while 8% used a telephone on-site. Another 5% booked accommodations at VICs with the help of travel counsellors.

Table 12: 2016 Non-Resident Vacation Parties (International) – Services Used at Visitor Information Centres (% Parties; May to October)

	Vacation	International Vacation
Obtained brochures/maps	88%	85%
Used washroom facilities	76%	58%
Received directions to attractions/sites of interest	67%	56%
Received directions to services/facilities	50%	41%
Received assistance with trip planning	39%	44%
Accessed Wi-Fi to use my own device(s)	23%	30%
Booked accommodations	7%	5%
Used the telephone	5%	8%
Accessed a computer located on site	5%	3%



International vacation visitors are more likely to use VICs to get trip planning assistance and to access Wi-Fi on their own devices

VICs play a significant role in enhancing the travel experience of vacation visitors to the province. Two thirds (67%) of international vacationers who 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, 45% indicated that they took part in an activity or event they wouldn't have taken part in and over one third (35%) of overseas travellers visited a part of the province they wouldn't have visited otherwise. Nineteen percent of international vacationers learnt something during their VIC stop that added to their overall trip experience in Newfoundland and Labrador.

Table 13: 2016 Non-Resident Vacation Parties (International) – As a Result of Visiting a VIC, did you ... (% Parties; May to October)

	Vacation	International Vacation
... Learn about an event, activity or area of the province you didn't know about before	71%	67%
... Take part in an activity or event that you wouldn't have taken part in otherwise	44%	45%
... Visit a part of the province that you wouldn't have visited otherwise	30%	35%
... Learn about anything else that added to your travel experience	23%	19%
... Extended your stay in the province	2%	2%

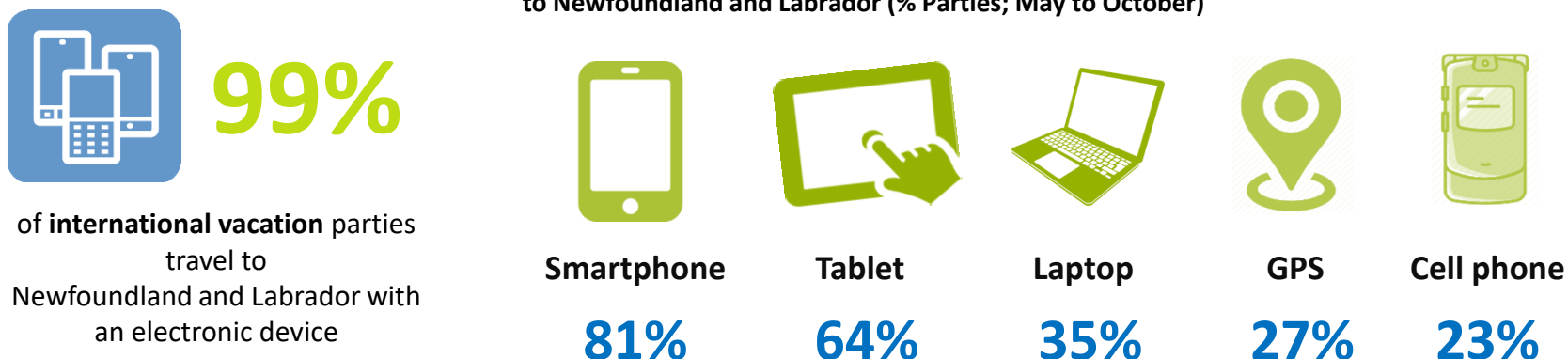
The importance of VIC services can also be seen in the fact that 2% of overseas vacation parties even extended their stay in the province.

SHARING EXPERIENCES

Over 80% of international vacationers share their travel experiences in the province

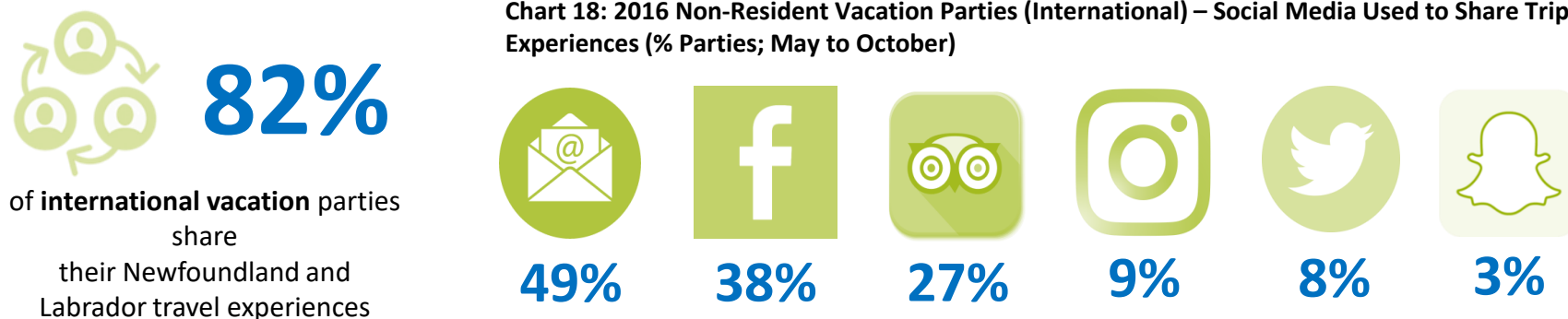
Like all of our vacation visitors, international vacationers are staying connected during their trip, with nearly all (99%) reporting that they travel with some type of electronic device. Over 80% of international visitors travel with their smartphone, while tablets (64%) are also very common. At 35% and 27% each, laptops and GPSs can be found in many a suitcase as well. While over 40% of vacation visitors overall travel with traditional cell phones, only 23% of international vacationers do so, reflecting a higher rate of smartphone ownership (81% vs. 68%).

Chart 17: 2016 Non-Resident Vacation Parties (International) – Electronic Devices Taken on Trip to Newfoundland and Labrador (% Parties; May to October)



More than eight in ten international vacationers indicated they shared or planned to share their Newfoundland and Labrador travel experiences, a notably smaller share than among vacation parties overall (94%). Emailing or texting (49%) was the most popular way of sharing travel experiences, while close to 40% are sharing experiences using Facebook. While international visitors are a little more inclined to use TripAdvisor (27% vs. 23% all vacationers) and Twitter (8% vs. 5%), a smaller share of them use Instagram (9% vs. 13%) to share their vacation experiences.

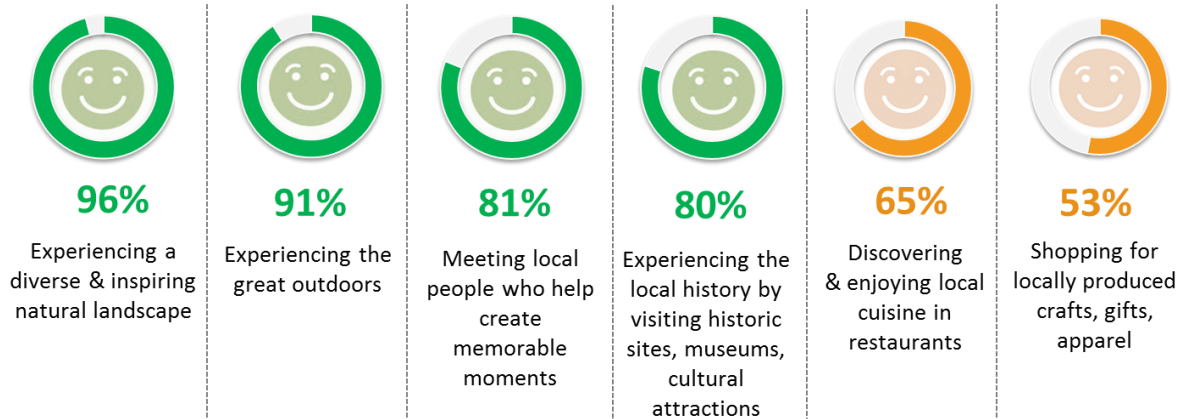
Chart 18: 2016 Non-Resident Vacation Parties (International) – Social Media Used to Share Trip Experiences (% Parties; May to October)



TRIP SATISFACTION

International visitors are generally very satisfied with their trip experience in Newfoundland and Labrador

Chart 19: 2016 Non-Resident Vacation Parties (International) – Trip Satisfaction with Experiences (% of parties rating 8-10 on a 1-10 point scale; May to October)



Overall, international vacation visitors reported high levels of satisfaction with most aspects of their trip in the province. These visitors are most satisfied with the ability to experience a diverse and inspiring natural landscape (96%) and the great outdoors (91%). High levels of satisfaction are also reported with opportunities to meet local people who help create memorable moments (81%) and the ability to take in local history by visiting historic sites, museums and cultural attractions (80%). Compared to vacationers overall, those from overseas reported significantly lower levels of satisfaction with discovering and enjoying local cuisine in restaurants (65% vs. 78%) and shopping for locally produced crafts and gifts (53% vs. 73%).

Chart 20: 2016 Non-Resident Vacation Parties (International) – Trip Satisfaction with Services and Facilities (% of parties rating 8-10 on a 1-10 point scale; May to October)

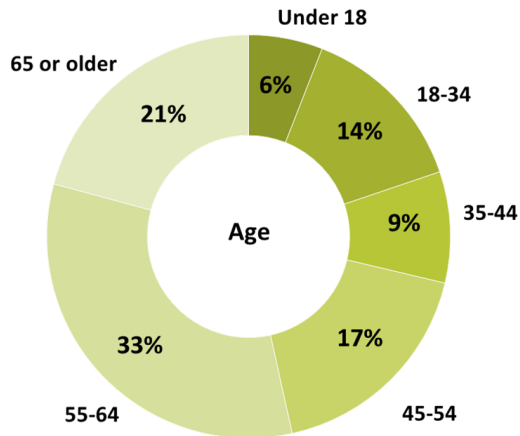


International vacationers reported a relatively high level of satisfaction with customer service at paid accommodations (85%) and with facilities and amenities at paid accommodations (83%). International vacation parties were also very satisfied with customer service in restaurants (81%). Lower levels of satisfaction are noted for road signage (66%) and tourism signage (64%). Compared to vacation visitors overall, international visitors were less satisfied with the overall value for money they perceived for their trip (71% vs. 77%).

VISITOR DEMOGRAPHICS

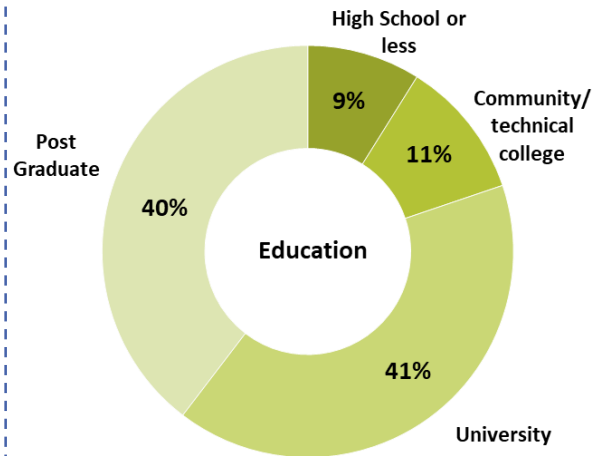
Over half of overseas vacationers to Newfoundland and Labrador are 55+, 14% are millennials

Chart 21: 2016 Non-Resident Vacation Visitors (International) – Age
(% Visitors; May to October)



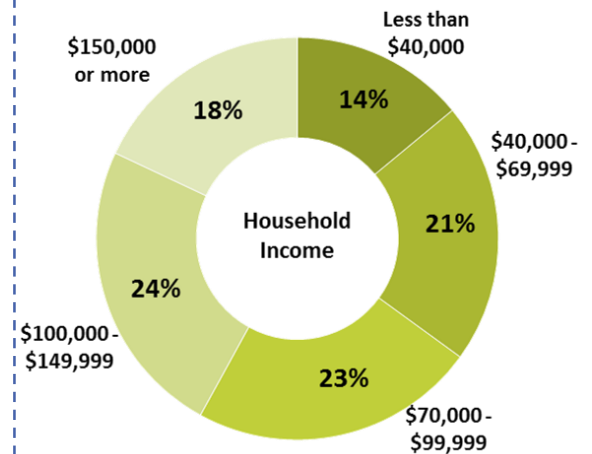
Over half of international vacationers are aged 55 or older (54%), with 21% aged 65 years or older. Compared to vacation visitors overall, fewer international vacationers are over the age of 65 (21% vs. 31%). Nearly one in five international visitors is aged 45 to 54 while only 9% are between the ages of 35 and 44. Compared to vacation visitors overall, more international visitors (14% vs. 10%) are between 18 and 34 years old (the age group that is also known as “Millennials”).

Chart 22: 2016 Non-Resident Vacation Visitors (International) – Education
(% Visitors; May to October)



International vacation visitors to Newfoundland and Labrador are highly educated, and, compared to vacation visitors overall, are more likely to hold post-graduate degrees (40% vs. 30%). Over 40% have graduated university while only 9% of overseas visitors indicated a level of education of high school or less. Another 11% finished a community or technical college.

Chart 23: 2016 Non-Resident Vacation Visitors (International) – Household Income
(% Parties; May to October)



Similar to the typical vacation visitor to Newfoundland and Labrador, international visitors are affluent, with close to half (47%) reporting household incomes of greater than \$100,000. This group includes a quarter of travel parties with household incomes of more than \$150,000. One quarter of overseas vacationers indicated household incomes of between \$70,000-\$99,999, while 34% reported household incomes less than \$70,000 annually.