

**Newfoundland and Labrador –  
Non-Resident Travel Motivations Study 2014**  
***Profile of US Travellers***

# Table of Contents

Introduction – 3

Methodology – 4

1. Travel Incidence and Past Travel for US Travellers – 5
2. Destination Awareness and Travel Intentions for US Travellers – 11
3. Advertising Awareness for US Travellers – 22
4. Travel Attitudes and Motivations among US Travellers – 30
5. Trip Planning Behaviour for US Travellers – 39
6. Vacation Destination Newfoundland and Labrador – 47
7. US Traveller Demographics – 61

# Introduction

- The Non-Resident Travel Survey was conducted by Harris/Decima on behalf of the Department of Tourism, Culture and Recreation, Government of Newfoundland and Labrador, to provide Newfoundland and Labrador Tourism with strategic information to develop a detailed profile of the travel market in terms of attitudes, motivations and perceptions of the province to support developing travel products and marketing programs
- The study had several key objectives:
  - To determine non-residents' perceptions and attitudes towards, as well as their interest in, Newfoundland and Labrador as vacation destination
  - To determine trip motivating factors and identify the importance of activities and travel icons as trip influencers and in destination choice
  - To determine opportunities to influence non-residents to travel to this province.
  - To identify barriers to travel to Newfoundland and Labrador
  - To investigate travel planning behaviour
- The survey focused on vacation/pleasure travel
- The survey sample consisted of US travellers from Harris Interactive's online panel
- For the purposes of this study, vacation/pleasure travel was defined as:
  - Trips outside of the United States, of two or more nights, with at least one night spent in paid accommodations, including trips to visit friends and relatives and combined business-pleasure trips
- Panel respondents qualified for participation in the survey
  - **IF** they had taken such vacation/pleasure trips in the past three years
  - **OR** would definitely / very likely take such a vacation/pleasure trip in the next year

# Methodology

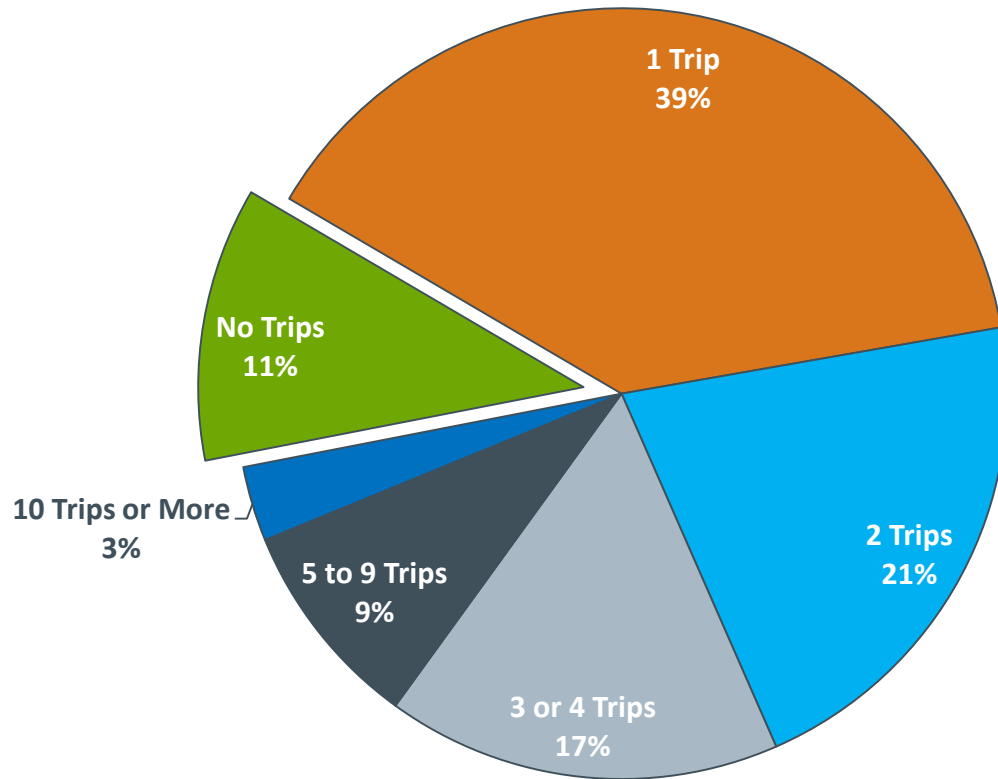
- Harris/Decima conducted an online survey with 526 US travellers from Harris Interactive's proprietary online panel of US respondents
- The US panel sample was weighted by region
- Harris/Decima designed the survey questionnaire in close consultation with Newfoundland and Labrador Tourism
- The survey was conducted between 6 and 23 November, 2013
- Results in this report are applicable to **"US travellers"**



# **1 – Travel Incidence and Past Travel for US Travellers**

# Travel Incidence

## Vacation/Pleasure trips outside the United States in the past 3 years



### Demand for travel outside the US is high

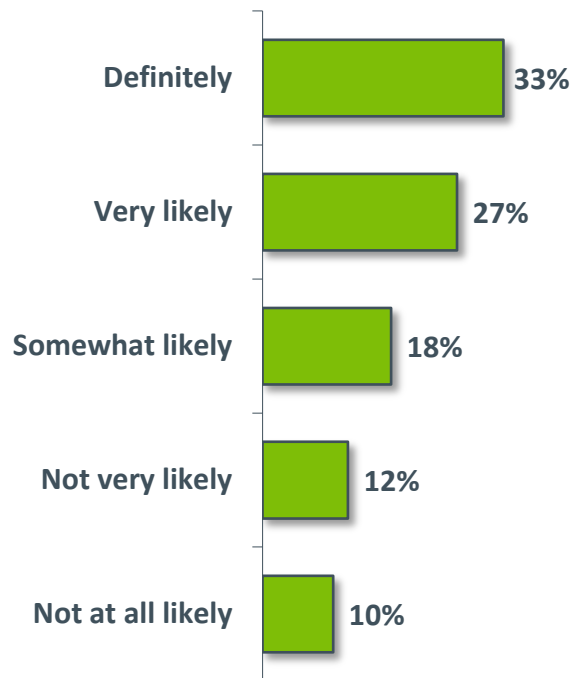
- 89% of US travellers took at least one vacation/pleasure trip outside the US in the past 3 years
- Trip intensity of out-of-country travel is relatively soft, with about 3 in 10 travellers (29%) taking 3 or more trips out of the US during that period
- Only 12% of travellers travelled 5 or more times
- A very small portion of Americans (3%) were avid out-of-country travellers who took 10 or more trips

Base: US travellers (n=522); excluding "Don't know" responses

S4b. How many vacation/pleasure trips outside of the United States have you taken in the **past three years**? Include only vacation/pleasure trips of two or more nights where you spent at least one night in paid accommodations.

# Future Travel

## Likelihood to take a vacation/pleasure trip outside the United States



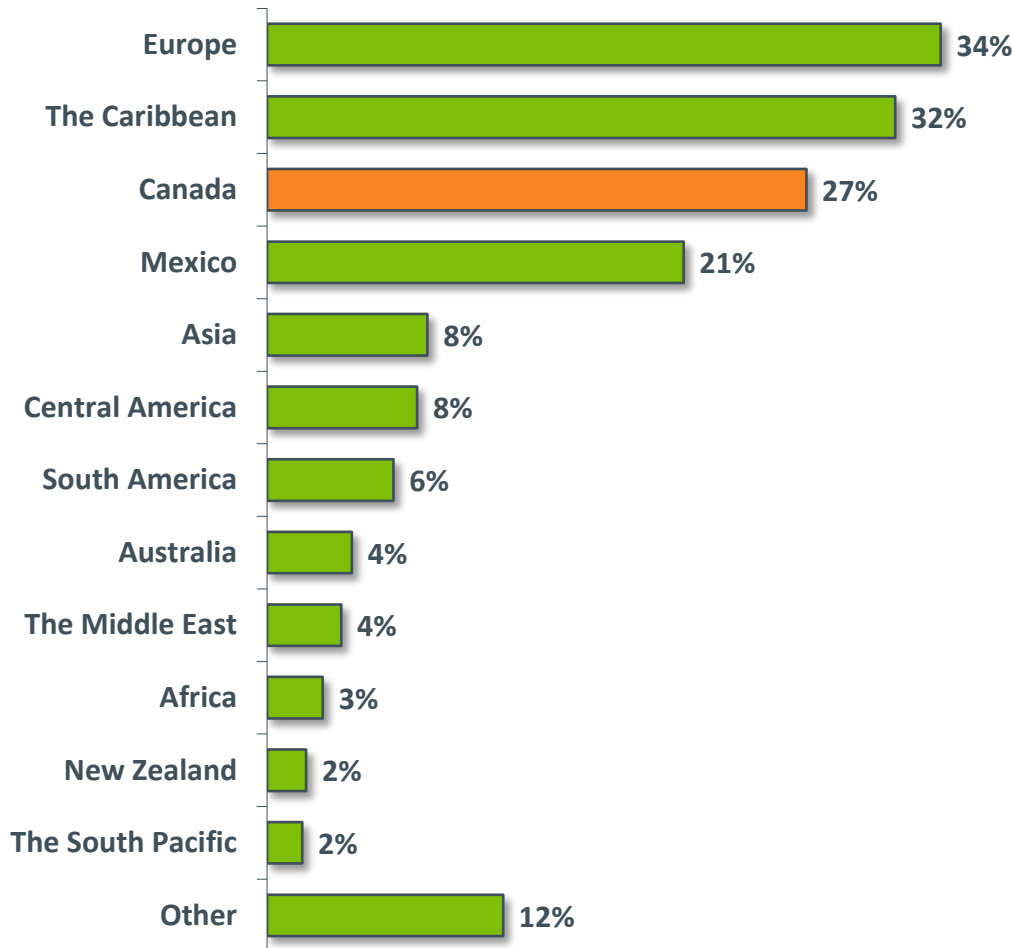
### Demand for out-of-country travel remains high

- Most US travellers are planning to continue travelling out of country, with 60% expecting to go on vacation trips in the next year
- One third of travellers indicated that they will 'definitely' travel while another 27% feel 'very likely' to be off on vacation
- About 2 in 10 US travellers feel less inclined to travel, with 10% indicating that they are not likely at all

Base: US travellers (n=515); excluding "Don't know" responses

S6. In the **next year**, how likely is it that you will take a vacation/pleasure trip of two or more nights outside of the United States where you will spend at least one night in paid accommodations?

# Countries or Regions Visited in the Past 3 Years



## Europe was top out-of-country destination for US travellers

- One third of US travellers (34%) chose Europe as a travel destination, just slightly topping the Caribbean (32%)
- The neighbour to the North, Canada, was a destination for just over a quarter of Americans
  - Visits to Canada were strongest from the New England/Mid Atlantic region (35% of residents of the region) and lowest from the Mountain/Pacific region (20%)
- Mexico, at 21%, was also a sought-after destination
- Other destinations around the world, including Asia, Central and South America, Australia and Africa, were favoured by only few American travellers

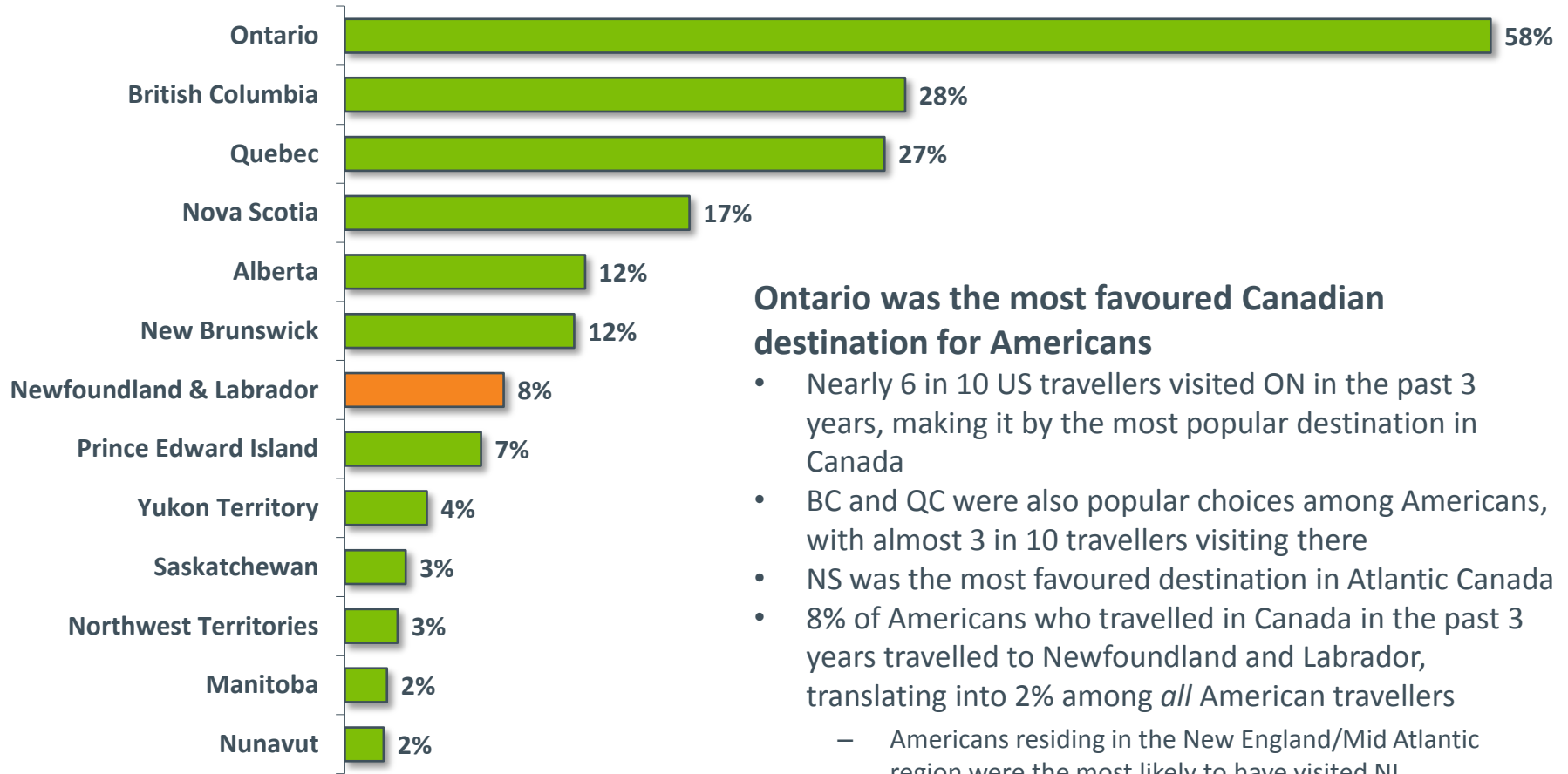
Base: US travellers who took trips in the past three years (n=415); excluding "Don't know" responses

Note: Travel within the United States was not included in this survey

S5. And which of the following countries or regions did you visit on the vacation/pleasure trips in the past three years?



# Canadian Provinces/Territories Visited (Past 3 Years)

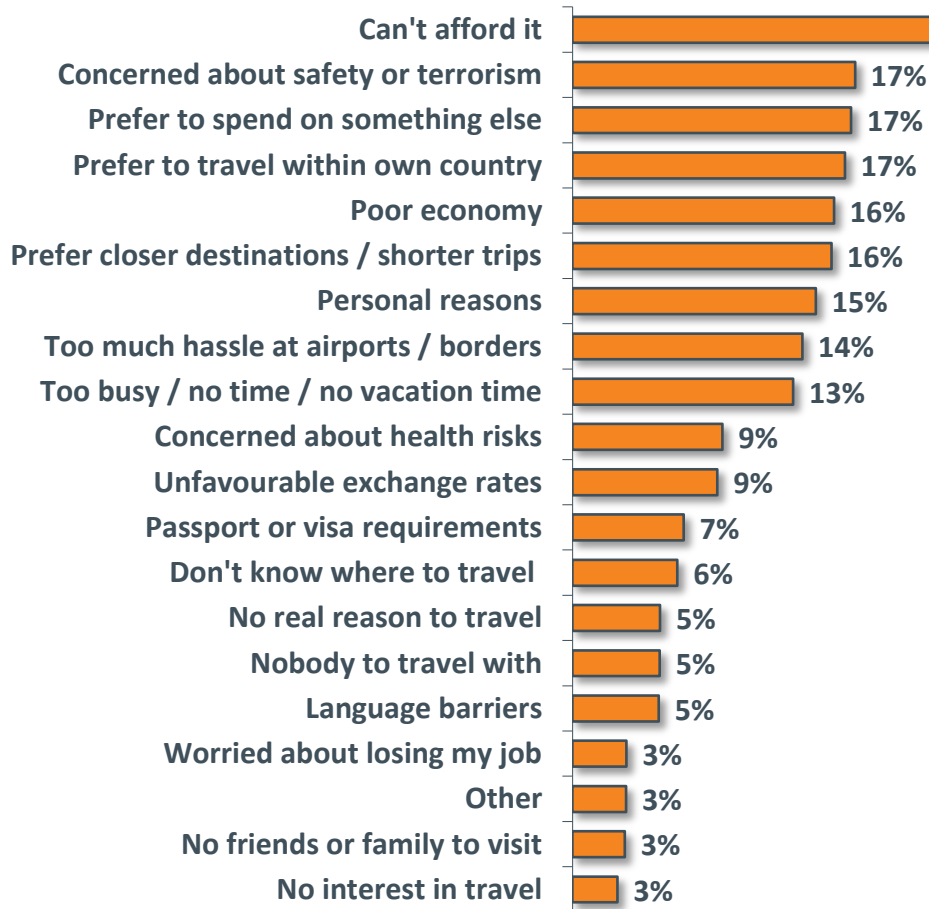


Base: US travellers who travelled within Canada in the past three years (n=114); excluding "Don't know" responses

S5a. And, which provinces or territories in Canada have you visited in the **past three years**?

# Reasons Preventing Vacation Travel

## Reasons for not taking an out-of-country vacation trip next year



### Affordability is the dominant reason for Americans not to travel outside the US

- This is true for nearly 4 in 10 travellers (38%) who indicated that they are unlikely to travel outside of the US in the next year
- Although Americans indicated a variety of reasons for not travelling, most of the reasons apply to only smaller portions of US travellers
  - Concerns about safety, a preference to spend money on something else or to travel in their own country are all cited by nearly 2 in 10 travellers
- While 16% of travellers are worried about a poor economy, only 3% are worried about losing their jobs
- Closer destinations/shorter trips, personal reasons, hassle at the borders and a lack of vacation time are also preventing more than 1 in 10 Americans from taking an out-of-country vacation trip

Base: US travellers who are not likely to travel outside the United States in the next year (n=215)

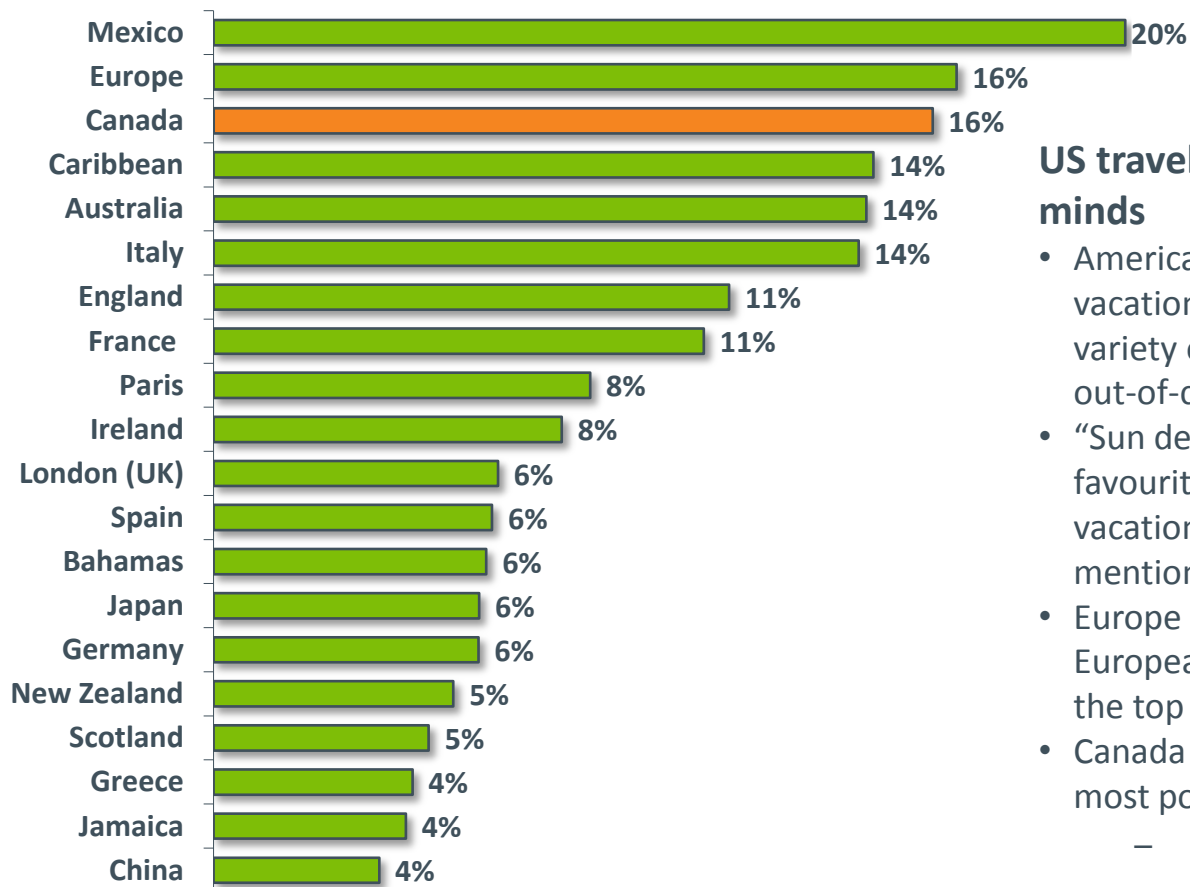
S7. Which of the following reasons is preventing you from taking a vacation/pleasure trip outside of the United States in the next year?

The background features several thin, light green wavy lines at the top and a series of thick, overlapping green bands at the bottom, creating a sense of movement and depth.

## **2 – Destination Awareness and Travel Intentions for US Travellers**

# Unaided Destination Awareness - Overall

## Top 20 destinations<sup>1</sup>



### US travellers have sunshine on their minds

- Americans have very diverse ideas about vacation travel as demonstrated by the variety of top of mind destinations for an out-of-country trip
- “Sun destinations”, specifically Mexico, are a favourite US travellers when they think of vacation travel, with the Caribbean (general mention) also among the top 5
- Europe (general mention) as well as specific European destinations feature strongly in the top 20 list of Americans
- Canada (general mention) is also among the most popular destinations
  - Top spots in Canada mentioned include Toronto, Montreal, Vancouver, Niagara Falls and Ontario (general)

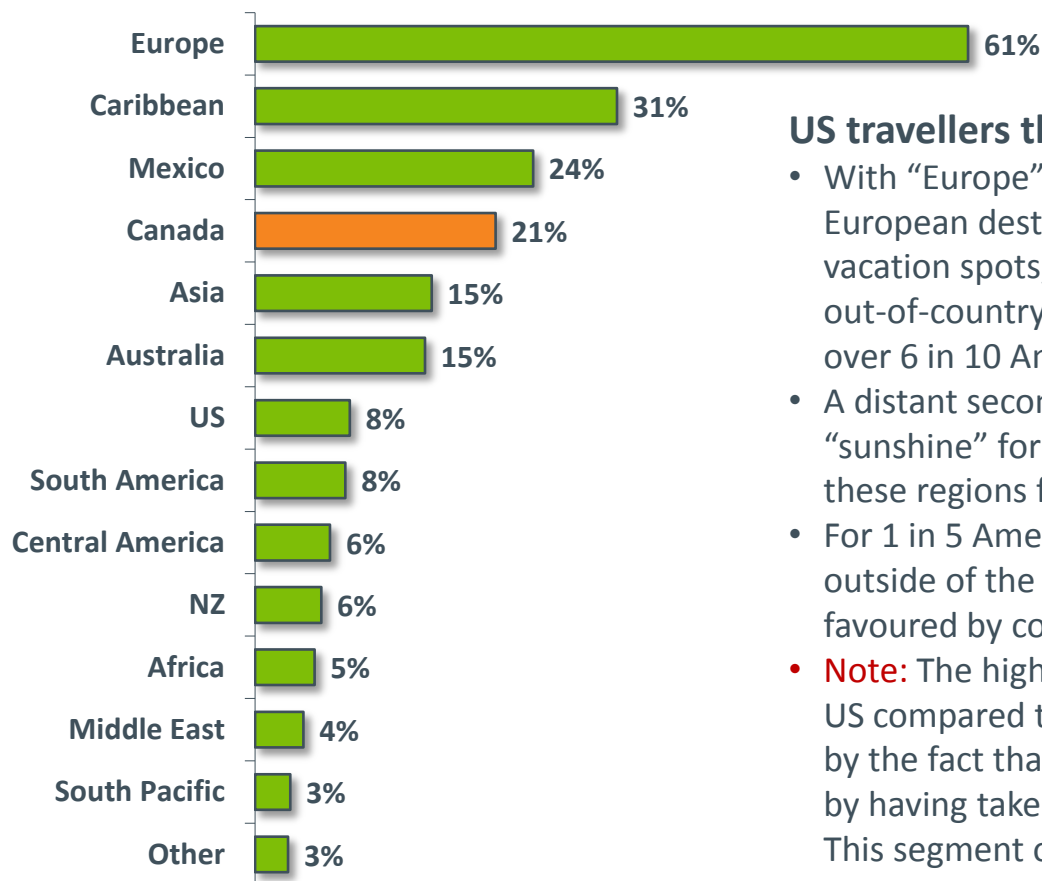
Base: US travellers (n=526)

Notes: <sup>1</sup> Responses as mentioned by the respondents, e.g. , percentage who said “Paris” specifically

A1. In general, when you think of vacation/pleasure travel, which destinations come to mind? (vacation or pleasure trips outside the US)

# Unaided Destination Awareness – Regions

## Regional roll-up<sup>1</sup>



### US travellers think “Europe” for a vacation trip

- With “Europe” (general mention) plus another 10 specific European destinations featuring in the top 20 top-of-mind vacation spots, it is not surprising that Europe is the premier out-of-country vacation destination for US travellers, with over 6 in 10 Americans favouring it as a place to go
- A distant second and third, the Caribbean and Mexico spell “sunshine” for 31% and 24% of travellers who would choose these regions for a vacation trip
- For 1 in 5 Americans, Canada is the place to go for a vacation outside of the US while other regions around the world are favoured by considerably fewer travellers
- **Note:** The high awareness ranking of destinations outside the US compared to the lower ranking of the US itself is impacted by the fact that respondents could only qualify for this survey by having taken a trip or are planning a trip outside the US. This segment of US travellers is likely more inclined to take vacation trips outside of the US than within the US

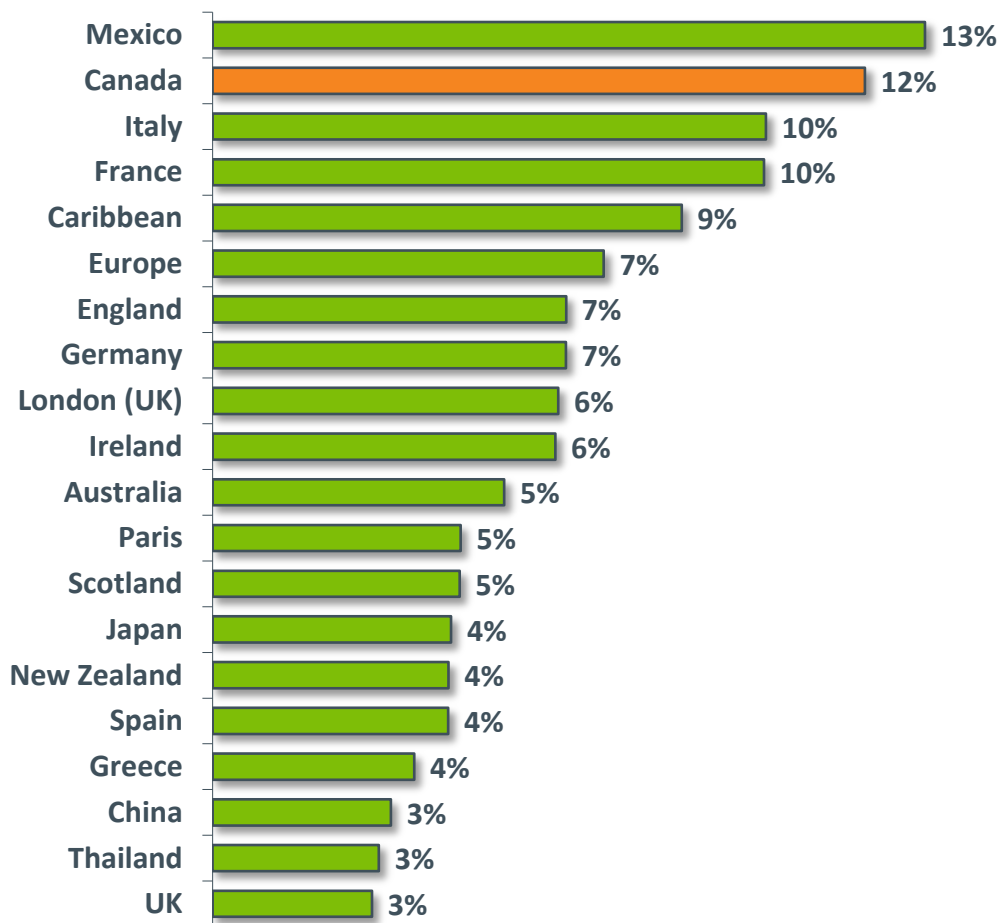
Base: US travellers (n=526)

<sup>1</sup> Roll-up of destination mentions by region, e.g., percentage who said “Canada” or any destination in that region

A1. In general, when you think of vacation/pleasure travel, which destinations come to mind?

# Unaided Destination Consideration

## Top 20 destinations<sup>1</sup>



### Mexico tops Americans' consideration for a vacation trip in the short term

- US travellers are seriously considering Mexico for a vacation in the next 2 years which received the highest number of mentions
- Canada, Italy, France and the Caribbean also garner serious consideration, with about 10% of mentions by Americans
- Toronto and Vancouver are the top choices in Canada, with 'Newfoundland' and 'St. John's' also being mentioned
- As with vacation destinations favoured by Americans in general, Europe also features prominently for trips under consideration in the next 2 years, with 11 specific destinations in the top 20

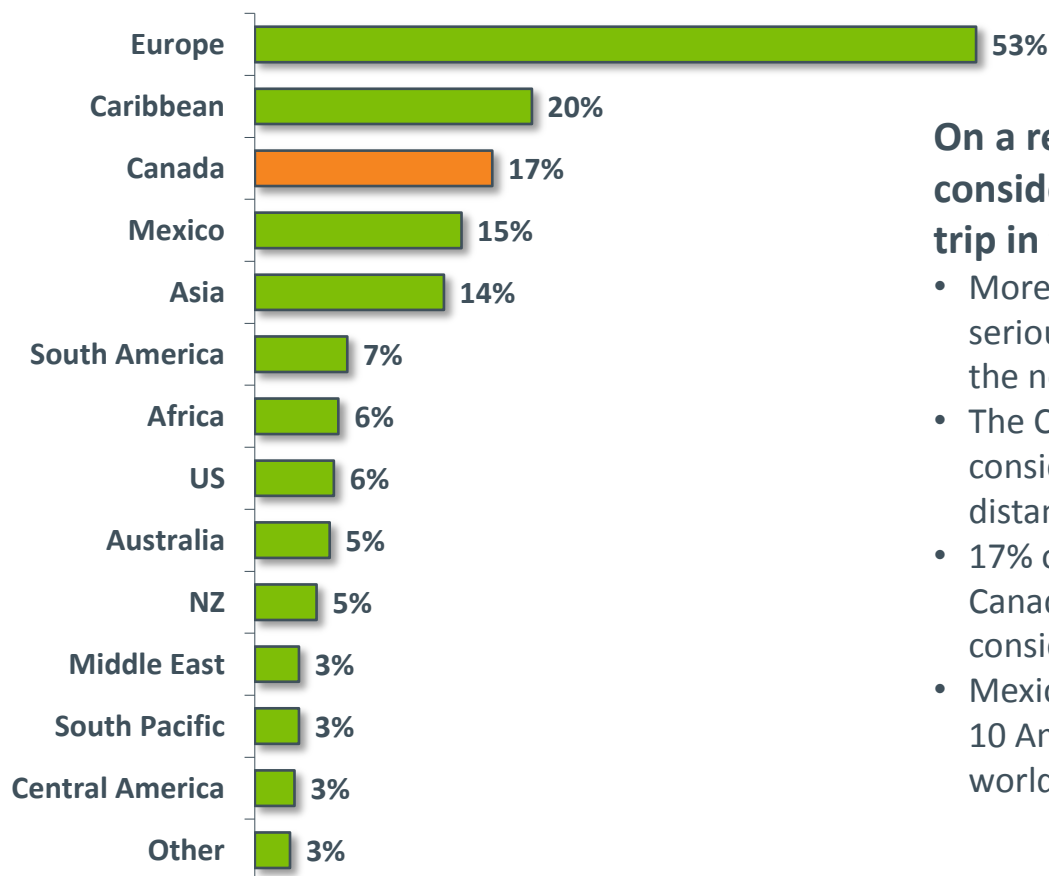
Base: US travellers who indicated they are definitely or very likely to travel in the next year (n=311)

Notes: <sup>1</sup>Responses as mentioned by the respondents, e.g. , percentage who said "Paris" specifically

A2. Thinking a little further ahead, what destinations are you seriously considering for your trips in the next two years?

# Unaided Destination Consideration

## Regional roll-up<sup>1</sup>



### On a regional basis, Europe tops Americans' consideration for an out-of-country vacation trip in the short term

- More than half of US travellers (53%) are seriously considering Europe for a vacation trip in the next 2 years
- The Caribbean, with 1 in 5 US travellers considering this region for a vacation trip, is a distant second favourite
- 17% of Americans are seriously considering Canada, with Toronto and Vancouver being top considerations in that country
- Mexico and Asia are considered by more than 1 in 10 Americans while other regions around the world are on considerably fewer travel lists

Base: US travellers who indicated they are definitely or very likely to travel in the next year (n=311)

<sup>1</sup>Roll-up of destination mentions by region, e.g., percentage who said Europe or any destination in that region

A2. Thinking a little further ahead, what destinations are you seriously considering for your trips in the next two years?

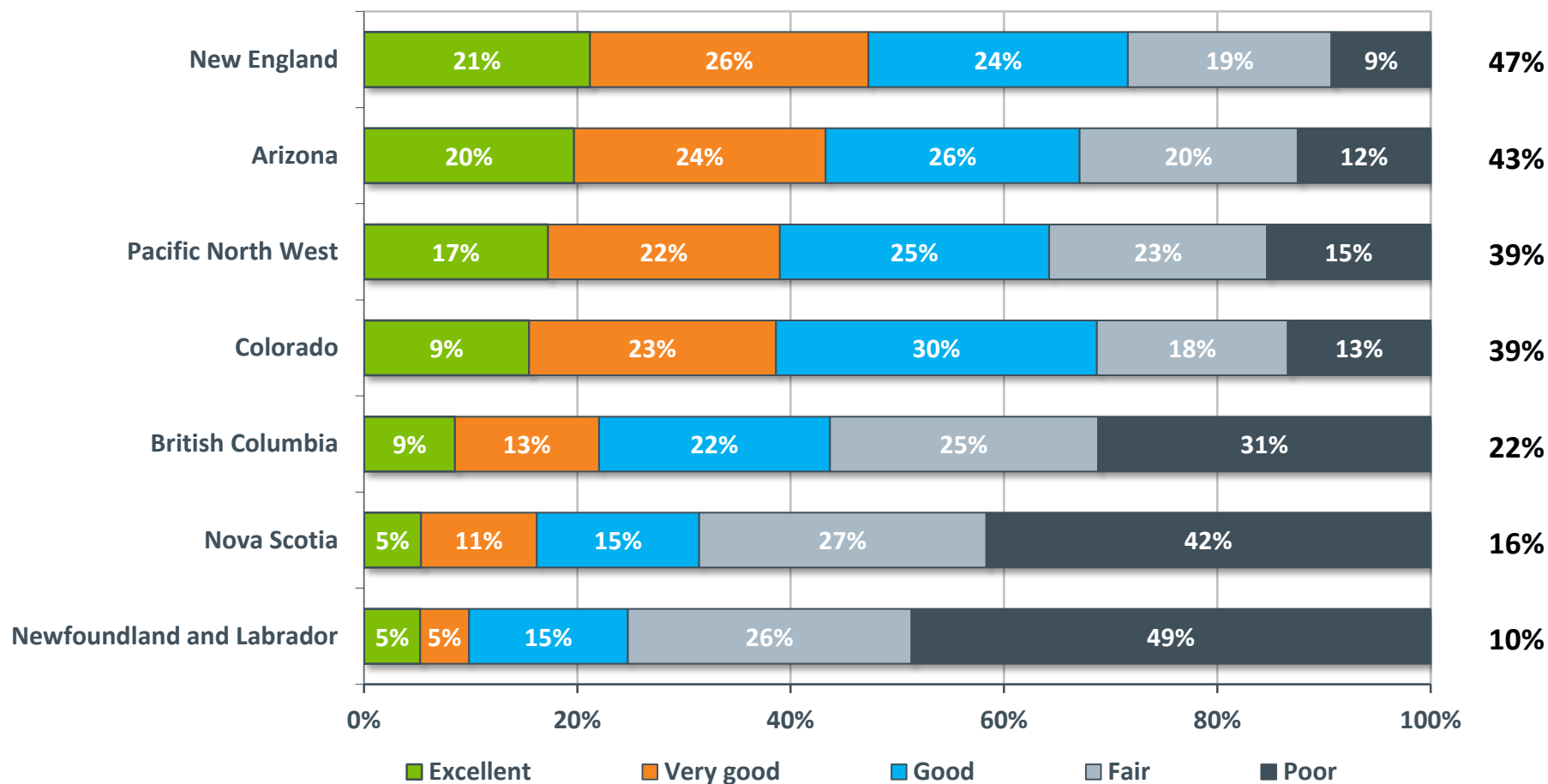
# Aided Destination Knowledge

- When asked about their knowledge of vacation travel opportunities in specific Canadian and US destinations, US travellers appear to be most familiar with opportunities in New England and Arizona
  - 47% (New England) and 43% (Arizona) of US travellers respectively rated their knowledge of travel opportunities in these two regions as 'excellent' or 'very good'
  - As well, nearly 4 in 10 US travellers claim at least very good knowledge of travel opportunities in the Pacific North West (including Oregon, Washington) (39% rating 'excellent' or 'very good') and also of Colorado (39%)
- Americans are less familiar with opportunities in specific Canadian destinations (including BC, NS and NL)
  - While US travellers appear to be most familiar with BC (22% indicated at least very good knowledge), this is less the case with NS (16%) and NL (10%)
- Knowledge of travel opportunities in the listed destinations is similar across age groups for Arizona, however, for all other destinations, 18-34 year olds indicate above average knowledge of travel opportunities
  - Generally, knowledge of travel opportunities across the specific destinations appears to drop with age, with 55+ year olds indicating the lowest levels of at least 'very good' knowledge
- Knowledge of travel opportunities in Canadian destinations among US travellers is generally weaker than that of US destinations across all age groups
  - Knowledge of BC is strongest among all age groups
  - 18% of 18-34 year olds indicated 'excellent' or 'very good' knowledge of travel opportunities in Newfoundland and Labrador while the same is true for 13% of 35-54 year olds and only 6% of the 55+ age group



# Aided Destination Knowledge

**Top 2 Box<sup>1</sup>**



Note: indicated knowledge levels are impacted by the fact that responses for all destinations with the exception of NL include local residents while responses for NL include only non-residents

Base: US travellers (n=526)

Note:<sup>1</sup>Top 2 Box refers to a rating of 'Excellent' or 'Very good' on a 5-point excellence scale.

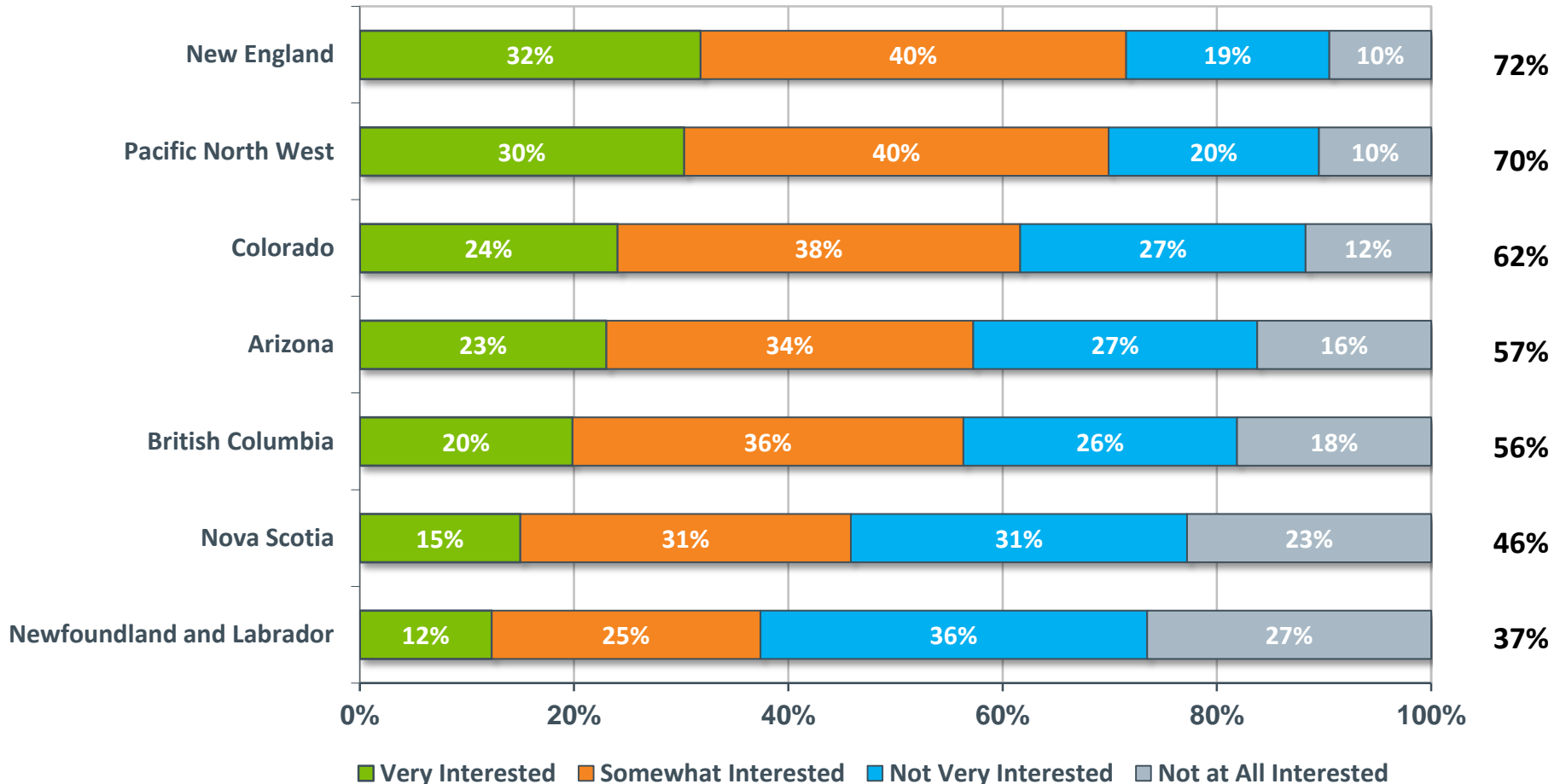
A3. How would you rate your level of knowledge of vacation/pleasure travel opportunities in each of the following destinations?

# Aided Destination Interest (Next Two Years)

- When asked about their interest in taking a vacation trip to specific US and Canadian destinations in the next 2 years, US travellers show particularly high levels of interest in the New England and Pacific Northwest regions
  - More than 7 in 10 Americans are at least 'somewhat interested', with about 3 in 10 being 'very interested'
  - Colorado and Arizona garner somewhat less interest but interest in these regions is still high with about 6 in 10 travellers being at least 'somewhat interested'
- More than half of Americans (56%) are also at least 'somewhat interested' in BC
- Comparatively fewer Americans are interested in a vacation trip to Nova Scotia (46%) and Newfoundland and Labrador (37%)
- With the exception of Arizona and New England, interest in the other US and Canadian destinations is above average in the 18-34 age group
  - At almost 8 in 10 travellers, this age group showed highest interest in Colorado and the Pacific Northwest, with interest in Nova Scotia at 66% and in this province at 50%
- 35-54 year olds indicated slightly higher interest in visiting New England and Arizona than the other age groups
  - This age group showed highest interest levels in New England (73%) and Colorado (67%)
  - Interest in Nova Scotia (47%) is ahead of interest in Newfoundland and Labrador (36%)
- The 55+ age segment generally indicated lower levels of interest in visiting the listed destinations than the other age groups
  - Travellers of that age group indicated highest interest by far in New England (71%) and the Pacific North West (70%)
  - Comparatively fewer 55+ year olds are interested in travelling to Arizona (56%)
  - Just one third of travellers in this age group expressed some interest in Newfoundland and Labrador (34%) , with Nova Scotia garnering slightly higher interest at 39%

# Aided Destination Interest (Next Two Years)

**Top 2 Box<sup>1</sup>**



Base: US travellers (n=526)

Note: <sup>1</sup>Top 2 Box refers to a rating of 'Very Interested' or 'Somewhat Interested' on a 4-point Interest scale

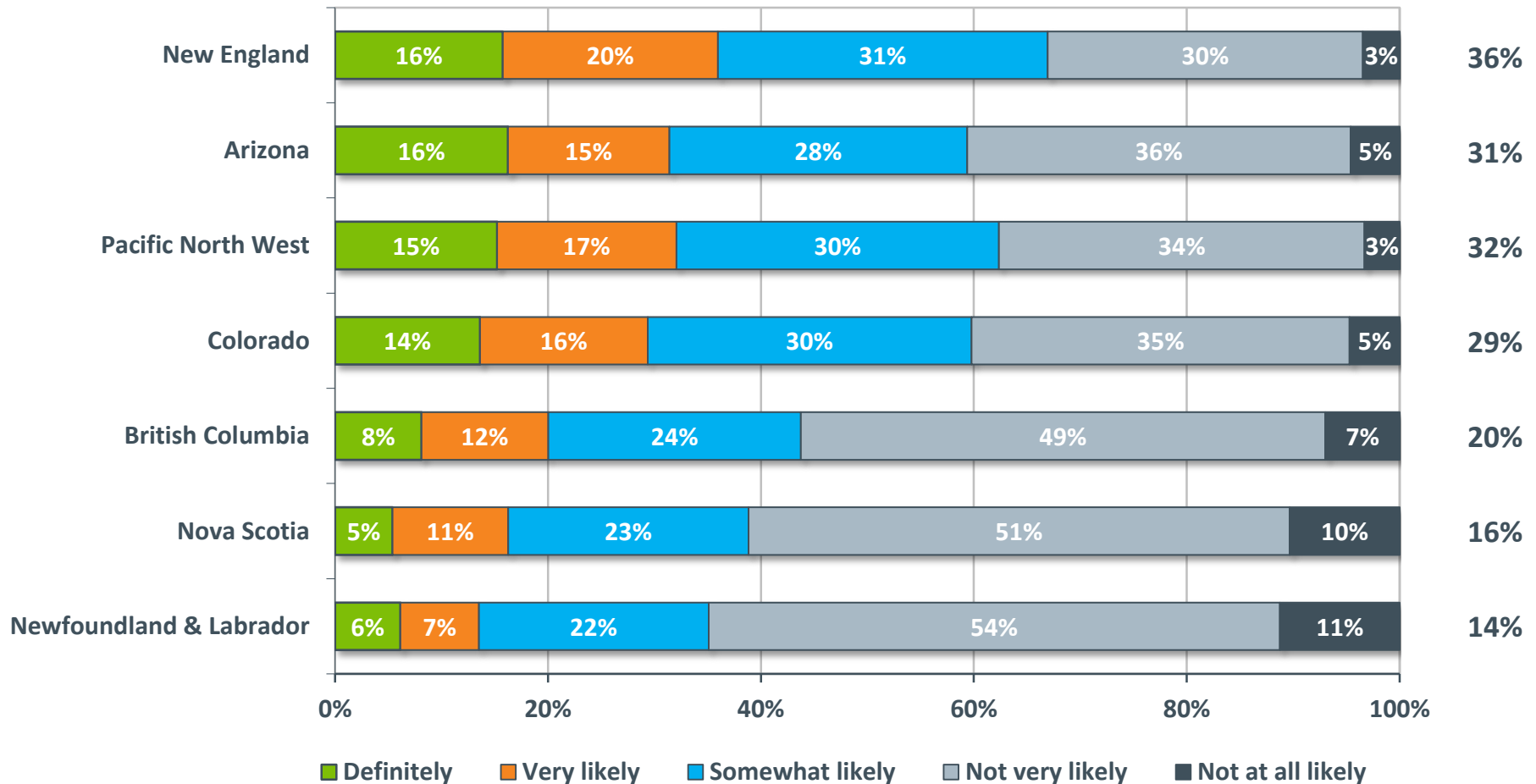
A4. How interested are you in taking a vacation/pleasure trip to each of the following destinations in the **next two years**?

# Travel Intentions – Next Five Years

- Among specific US and Canadian destinations, New England is the top destination to which Americans are the most likely to take a vacation trip in the medium term
  - 16% of US travellers indicated they would ‘definitely’ take a vacation trip to New England within the next 5 years
  - In addition, 1 in 5 US travellers are ‘very likely’ to take a vacation trip to New England within the next 5 years
- Arizona, the Pacific North West as well as Colorado are popular with US travellers, with about 3 in 10 travellers indicating that they would ‘definitely’ or are ‘very likely’ to take a vacation trip these regions in the next 5 years
- Travel intentions to Canadian destinations are well below those to US destinations, with about 1 in 5 or fewer Americans being at least ‘very likely’ to travel there
  - Americans are the most likely to travel to BC while travel intentions to NL are comparable to those to NS
- Survey results show that interest in a destination does not necessarily translate into immediate or mid-term travel intentions
  - New England, Arizona and BC have the largest gap (at least 36 percentage points) between the percentage of Americans who are at least ‘somewhat interested’ in taking a vacation trip to the destination (e.g. New England 72%) and the percentage of those who are at least ‘very likely’ to take a vacation to that destination (e.g. New England 36%)
  - This gap is lower for the Pacific North West, Nova Scotia and Colorado (28-30 points) and lowest for Newfoundland and Labrador (23 points)
  - The difference between the number of travellers who are interested in visiting a destination versus the number of travellers who intend to travel to that destination within a 5-year period may speak to the type of destination travellers perceive it as ... the larger the gap, the more likely it is that travellers perceive the destination as a “dream destination” or “bucket list” item
  - Conversely, the lower the gap the more certain travellers may be to actually take a trip to the destination

# Travel Intentions – Next Five Years

**Top 2 Box<sup>1</sup>**



Base: US travellers excluding those who are 'not at all interested' in the destination (New England: n=476; Arizona: n=441; Pacific North West: n=471; Colorado: n=464; BC: n=431; NS: n=406; NL: n=387)

Note: <sup>1</sup>Top 2 Box refers to a rating of 'Definitely' or 'Very likely' on a 5-point Likelihood scale

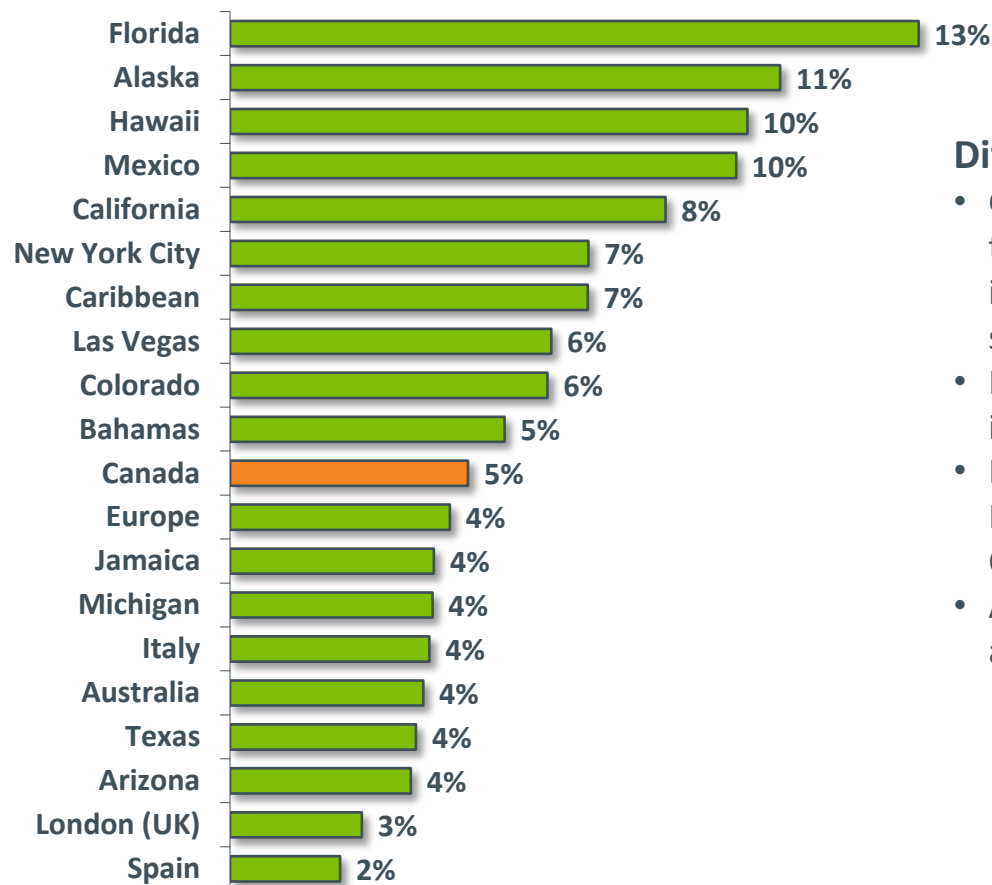
A6. And how likely are you to take a vacation/pleasure trip to each of the following destinations in the **next five years**?

The background features several thin, light green wavy lines at the top and a series of thick, overlapping green bands at the bottom, creating a sense of movement and depth.

## **3 - Advertising Awareness for US Travellers**

# Unaided Advertising Awareness

## Top 20 destinations<sup>1</sup>



### Diverse advertising recall

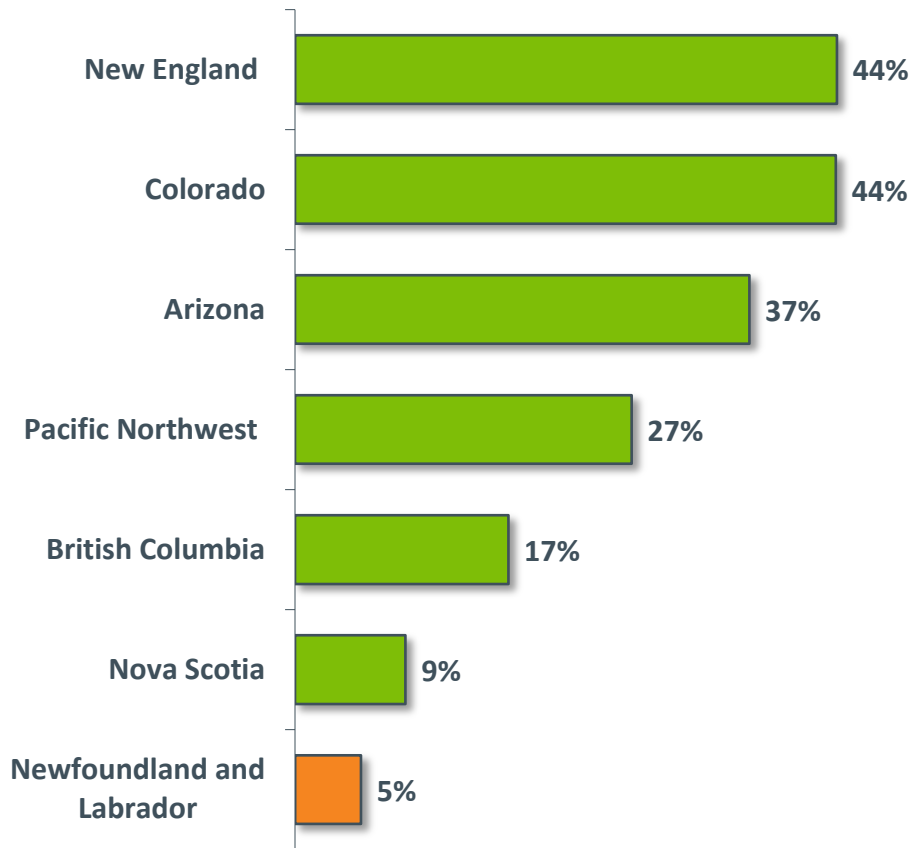
- Generally, advertising recall among US travellers spans a wide range of destinations, including both domestic and global vacation spots
- Florida enjoys high advertising recall, coming in as the top destination with 13%
- Recall of advertising for Alaska, Hawaii and Mexico followed closely at 10-11%, with California rounding out the top 5 at 8%
- At 5%, specific mention of Canada (general) also made it into the top 20

Base: US travellers (n=526)

Notes: <sup>1</sup>Responses as mentioned by the respondents, e.g. , percentage who said "New York City" specifically

B1. And now, thinking about travel or vacation advertising you may have seen or heard in the past 12 months, which destinations come to mind?

# Aided Advertising Awareness



## High advertising recall for US Destinations

- As can be expected, when asked about specific destinations, US travellers had a much higher recall of advertising for states or regions in their own country, with New England and Colorado coming out on top neck on neck
- Somewhat fewer Americans recalled ads for Arizona and the Pacific Northwest
- Among specific Canadian destinations respondents were asked about, ads for BC were recalled by almost 1 in 5 Americans, with NS and NL trailing at 9% and 5% respectively

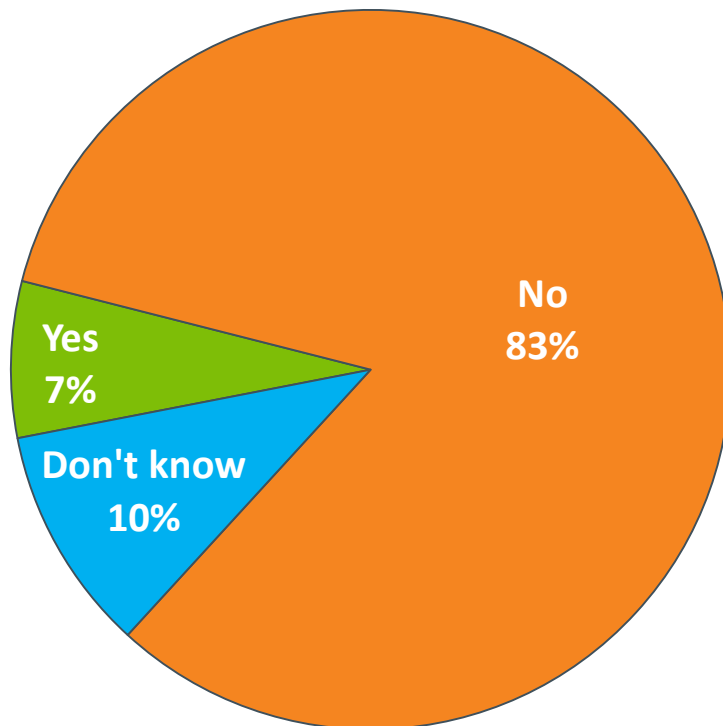
Base: US travellers (n=526).

B2. For which of the following destinations have you seen or heard advertising in the past 12 months?



# Aided Advertising Awareness for Newfoundland and Labrador

## US travellers who have seen or heard advertising for the province



Base: US travellers (n=526)

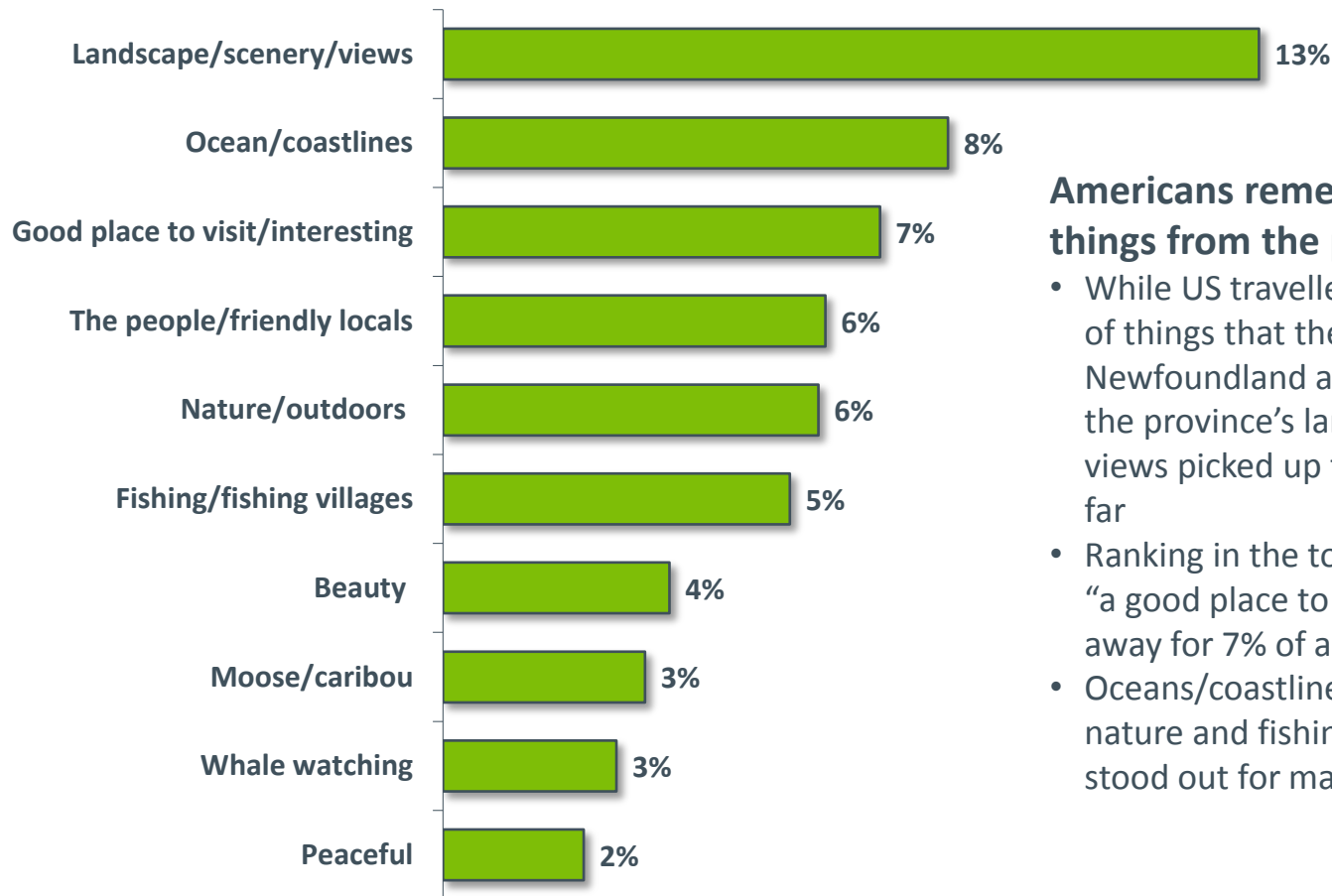
D2A. In the past 12 months, have you seen or heard any advertising for Newfoundland and Labrador?

## Comparatively low advertising recall for Newfoundland and Labrador

- When asked specifically whether they had seen or heard any advertising for Newfoundland and Labrador, fewer than 1 in 10 US travellers (7%) said “Yes”
- US travellers are mostly unaware of advertising for the province with 83% saying “No”
- 10% of Americans were unsure whether they had seen or heard any advertising for the province
- Among those who had seen or heard NL advertising, most came across it in a print magazine (63%), on TV (54%) and online (52%)
- Overall, including aided and unaided advertising awareness, 9% of US travellers indicated that they had seen or heard advertising for NL

# Advertising Recall for Newfoundland and Labrador

## Advertising features recalled – top mentions



### Americans remember a variety of things from the province's ads

- While US travellers remembered a number of things that they had seen or heard in Newfoundland and Labrador's advertising, the province's landscape, scenery and views picked up the greatest attention by far
- Ranking in the top 3 things recalled, being "a good place to visit" was the ad take away for 7% of ad aware travellers
- Oceans/coastlines, the friendly people, nature and fishing/fishing villages also stood out for many

Base: US travellers who have seen or heard any advertising about Newfoundland and Labrador (n=38) **Caution – small sample size!**

D2B. What specifically do you remember about the advertising you saw or heard?

# Impact of Advertising Awareness

## Interest in and likelihood to travel to NL by advertising awareness

	All Travellers (n=526)	Saw/heard advertising for NL (n=50)	Did not see/hear advertising for NL (n=476)
Interested in visiting (next two years)	37%	71%	34%
Likelihood of visiting (next two years)	14%	52%	9%
Likelihood of visiting (next five years)	14%	52%	9%

### Advertising creates market momentum

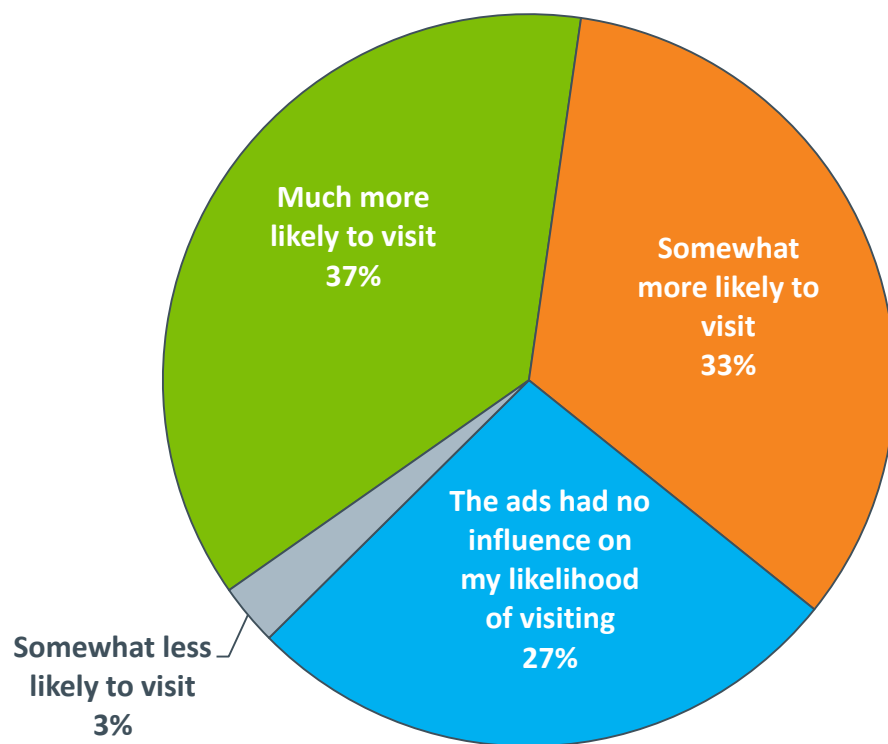
- US travellers **who have seen or heard** tourism advertising for Newfoundland and Labrador are more than twice as interested in visiting the province (71%) than those who haven't seen or heard any advertising (34%)
- With over half indicating that they will 'definitely' or 'very likely' visit the province, those aware of advertising are also significantly more likely to visit the province in the next 2 to 5 years than those who are not aware of any advertising

Base: US travellers (n=526).

Notes: Results shown are Top 2 Box scores ("very interested & somewhat interested" in the destination, "definitely" & "very likely" to travel to destination)

# Impact of Advertising Awareness

## Advertising impact on travel motivation



### Advertising positively impacts travel motivation

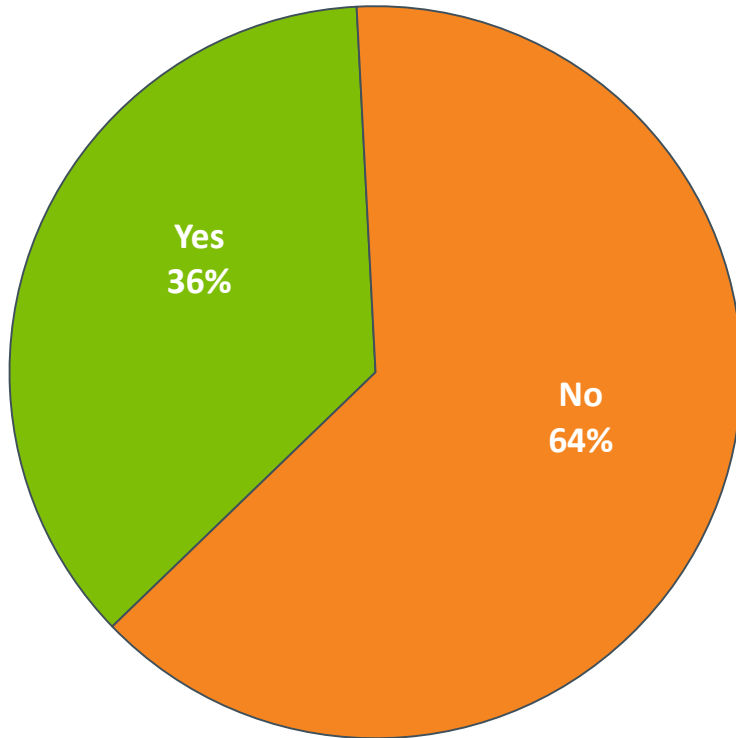
- Nearly 4 in 10 US travellers (37%) who had seen or heard advertising for NL felt that they were “much more likely” to travel to the province in the next 2 years after seeing or hearing the advertising
- An additional 33% indicated that they were “somewhat more likely” to visit the province after seeing or hearing the advertising
- Survey results show that being aware of tourism advertising for NL had a positive motivational impact on 7 in 10 US travellers

Base: Canadian travellers who have seen or heard any advertising about Newfoundland and Labrador (n=38) **Caution – small sample size**

D3B. After seeing or hearing the advertising for Newfoundland and Labrador, did your likelihood of visiting the Newfoundland and Labrador in the **next two years** change? Would you say that the advertising made you...

# Impact of Advertising Awareness

## Taken a trip after seeing or hearing NL advertising



### Advertising positively impacts travel decisions

- Over one third of American travellers indicated that they had taken a vacation trip to the province after seeing or hearing advertising for Newfoundland and Labrador
- 14% of US travellers who **were NOT previously planning** a trip, indicated that they had taken a vacation trip to the province after seeing or hearing advertising for Newfoundland and Labrador

Base: US travellers who have seen or heard any advertising about Newfoundland and Labrador (n=38) **Caution – small sample size!**

D3C. And since seeing or hearing the advertising have you taken or booked a vacation/pleasure trip to Newfoundland and Labrador?



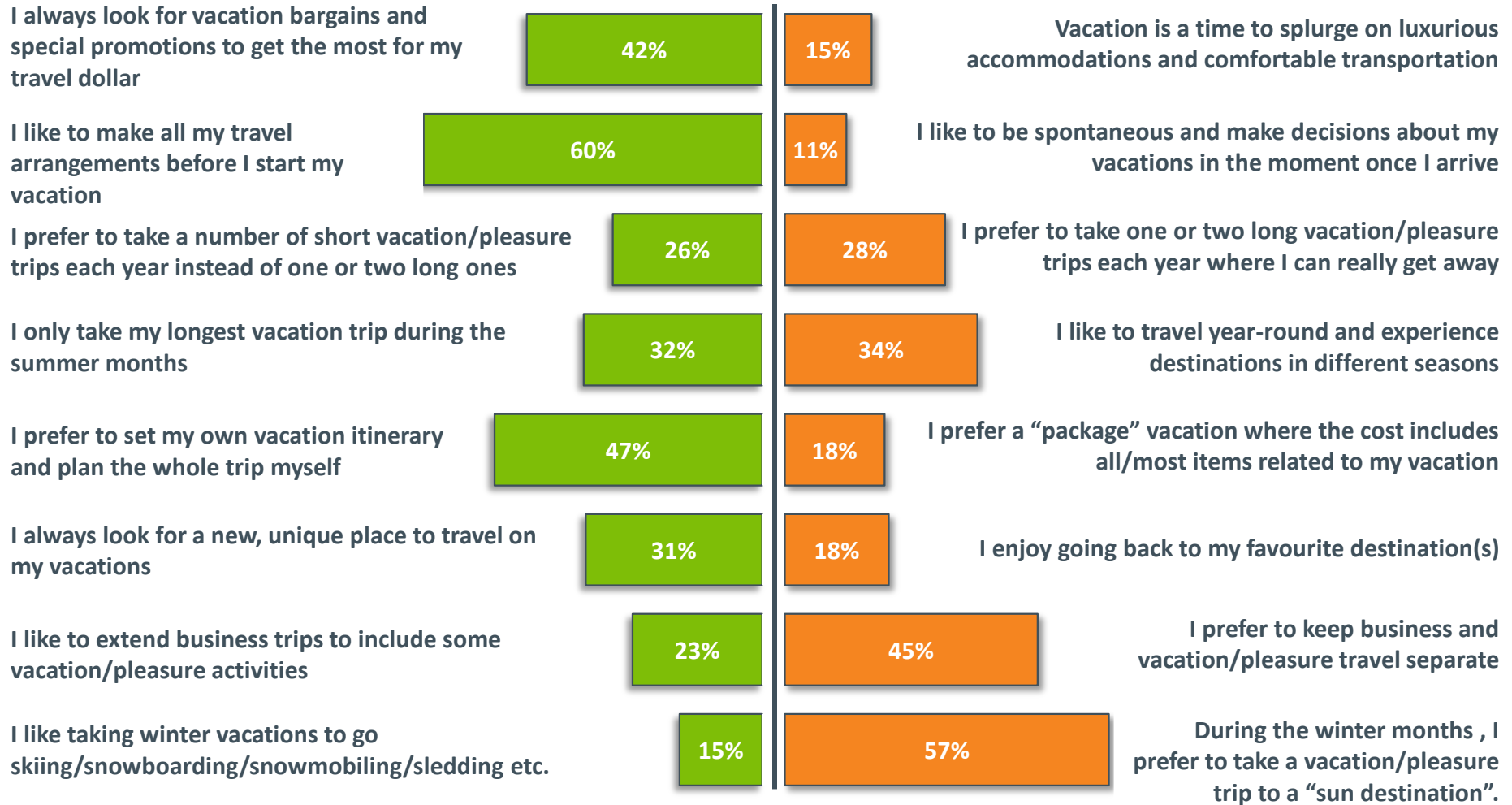
## **4 – Travel Attitudes and Motivations among US Travellers**

# Travel Preferences

## American travellers have diverse travel preferences

- The survey results also revealed insights into vacation travel preferences of Americans
- Pairs of statements were presented on opposite ends of a continuum and travellers were asked to indicate which statement best represented their preferences
- The graphic presents the proportion of travellers who indicated that they sit at one or the other end of the continuum
- When it comes to vacation travel, US travellers show some definite preferences:
  - Much like their Canadian counterparts, Americans tend to be “snow escapists”, with over half (57%) seeking “sun destinations” for vacation travel during the winter months while only 15% are into real winter vacations with skiing or snowboarding
  - 6 in 10 US travellers (60%) like to make their travel arrangements in advance rather than making spontaneous decision at the destination (11%)
  - Similarly, travellers prefer to set their own itinerary (47%) as opposed to taking all-inclusive package vacations (18%)
  - US travellers have a definite preference for travel deals, with 42% indicating that they look for bargains and specials rather than splurge (15%)
  - Americans also mainly like to keep business and pleasure travel separate (45%) and prefer new, unique destinations (31%) over going back to a favourite place (18%)
- Americans didn’t show any particular preference towards taking one or two long vacations (28%) versus taking several shorter trips (26%) or taking summer vacations only (32%) versus travelling year round (34%)
- Survey results show that US travellers are diverse and that they can be enticed by a variety of travel options that cater to their preferences

# Travel Preferences



Base: US travellers (n=526), % providing a Top 3 rating for each

C1. Listed below are pairs of statements that pertain to **travel preferences and behaviours**. For each pair, use the slider to indicate where your preferences sit between the two statements.

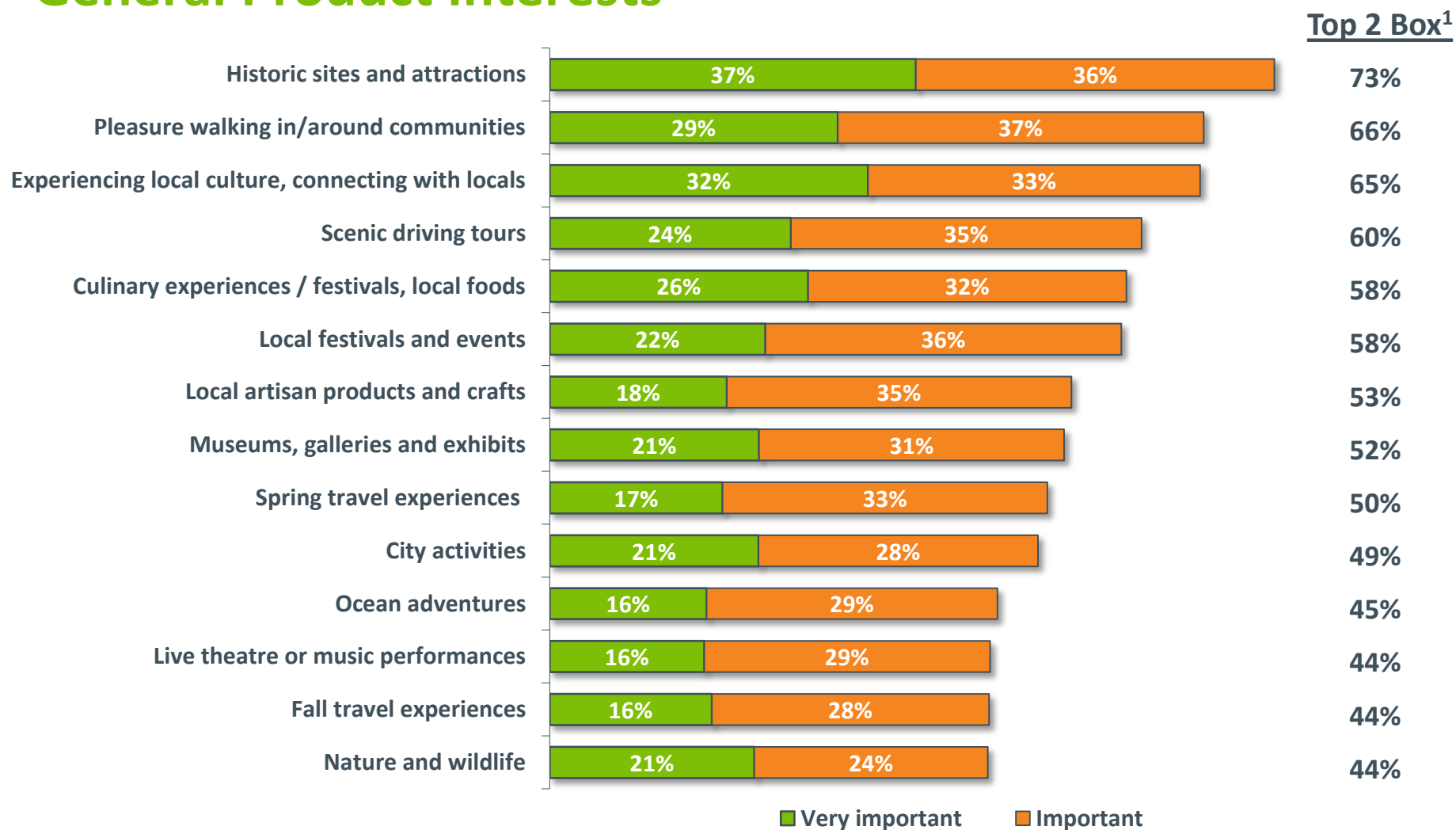


# General Product Interests

## Americans look for experiences that connect them with the destination

- There is a diverse range of experiences that are important to US travellers when they travel for vacation
- History (73%), pleasure walking (66%), local culture and heritage / connecting with locals (65%) top their list of interests and are important to a great majority of travellers
- Other experiences that connect travellers with the destination rank high on the importance list, including culinary experiences (58%), local events and festivals (58%) and local artisan products and crafts (53%)
- Also of importance to half of travellers or more when making destination decisions are scenic driving tours (60%), museums and galleries (52%) as well as spring travel experiences (50%)
- Resonating with more than 4 in 10 US travellers are city activities (49%), ocean adventures (45%) as well as nature and wildlife (44%), live theatre or music (44%) and fall travel (44%)
- Given US travellers' interests in travel experiences, there is great potential for enticing travellers with Newfoundland and Labrador as it has to offer what travellers are looking for
- Most importantly, the travel experiences US travellers are seeking the most are those that connect them with the destination
  - Newfoundland and Labrador is very well positioned with the distinct and unique local “flavour” or “personality” that it can offer, including a great range of national, provincial and UNESCO historic and heritage sites, local foods, local events and festivals and welcoming “friendly locals”
  - The province is also perceived as a vacation destination which travellers would favour over some other destinations for ocean adventures, experiencing local culture, UNESCO heritage sites and lighthouses

# General Product Interests



Base: US travellers (n=526)

Note: <sup>1</sup>Top 2 Box refers to a rating of 'Very Important' or 'Important' on a 5-point importance scale.

C2. We are interested in knowing what you are looking for in a vacation/pleasure trip. Please indicate how important each one is to you personally, when deciding on a destination for a vacation/pleasure trip.

# General Product Interests

Activity / Experience	Level of importance (Top 2 box) <sup>1</sup>	
	US travellers (n=526)	Interested in Newfoundland and Labrador (n=199)
Historic sites and attractions	73%	78%
Pleasure walking in/around communities	66%	75%
Experiencing local culture/heritage, connecting with locals	65%	75%
Scenic driving tours	60%	66%
Culinary experiences / festivals, tasting local foods and beverages	58%	63%
Local festivals and events	58%	71%
Local artisan products and crafts	53%	62%
Museums, galleries and exhibits	52%	58%
Spring travel experiences	50%	66%
City activities	49%	54%
Ocean adventures	45%	56%
Live theatre or music performances	44%	48%
Fall travel experiences	44%	60%
Nature and wildlife	44%	61%

## Higher levels of importance of activities and experiences among those interested in visiting NL

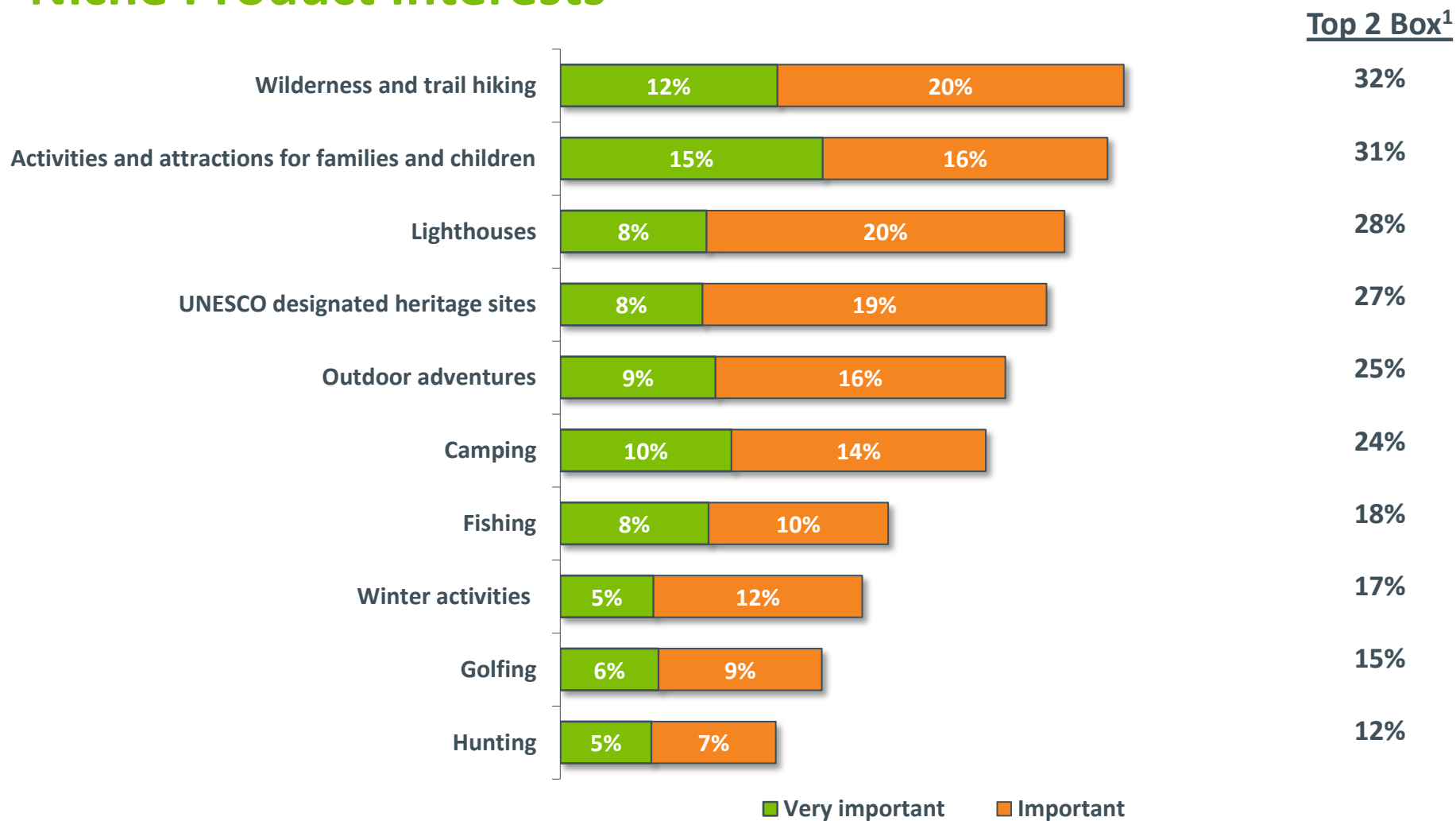
- US travellers who are at least somewhat interested in visiting NL on a vacation are seeking similar experiences to those of all US travellers but at considerably greater levels of importance to destination selection
- This applies in particular to nature and wildlife, fall and spring travel as well as local festivals/events
- Seeking ocean adventures and experiencing local culture also have a much stronger impact on travel decisions

Note: <sup>1</sup>Top 2 Box refers to a rating of 'Very Important' or 'Important' on a 5-point importance scale

# Niche Product Interests

- Among niche products, wilderness and trail hiking (32%) as well as activities for families and children (31%) top the list, being important to nearly one third of US travellers when selecting a vacation destination, closely followed by interest in lighthouses (28%) and UNESCO designated heritage sites (27%)
- Outdoor adventures (25%) as well as camping (24%) are also appealing to approximately one quarter of American travellers
- Winter activities (17%), fishing (18%), golfing (15%) and hunting (12%) are important to a smaller segment of US travellers when deciding on a travel destination

# Niche Product Interests



Base: US travellers (n=526)

Note: <sup>1</sup>Top 2 Box refers to a rating of 'Very Important' or 'Important' on a 5-point importance scale.

C2. We are interested in knowing what you are looking for in a vacation/pleasure trip. Please indicate how important each one is to you personally, when deciding on a destination for a vacation/pleasure trip.

# Niche Product Interests

Activity / Experience	Level of importance (Top 2 box) <sup>1</sup>	
	US travellers (n=526)	Interested in Newfoundland and Labrador (n=199)
Wilderness and trail hiking	32%	43%
Activities and attractions for families and children	31%	38%
Lighthouses	28%	41%
UNESCO designated heritage sites	27%	37%
Outdoor adventures	25%	34%
Camping	24%	35%
Fishing	18%	25%
Winter activities	17%	25%
Golfing	15%	17%
Hunting	12%	17%

## Higher importance of niche activities and experiences among those interested in visiting NL

- US travellers who are at least somewhat interested in visiting NL on a vacation trip are seeking similar experiences to those of all American travellers but at greater levels of importance to destination selection
- This applies in particular to hiking, lighthouses and family activities which are at least somewhat important to about 4 in 10 Americans interested in NL
- As well, UNESCO sites, outdoor adventures, camping and winter activities are much higher on these travellers' lists compared to US travellers in general
- Interest in fishing and hunting is also considerably higher

Note: <sup>1</sup>Top 2 Box refers to a rating of 'Very Important' or 'Important' on a 5-point importance scale



## 5 - Trip Planning Behaviour for US Travellers

# Information Sources for Trip Planning

- US travellers seek information from a wide variety of sources when planning their vacations
- Word of mouth is the most widely used source, with 52% of travellers using it when selecting a vacation destination
  - Word of mouth is also the most influential source of information, with 20% of Americans indicating that it has the most influence on their decision when selecting a vacation destination
- Travel deals, discounts and promotions are used by just under half (47%) of US travellers to gather information to help them make a decision
- Destination or attraction specific websites (41%) and travel review sites (36%) also influence the decisions of about 4 in 10 Americans
- Travel guides / books (35%) and TV travel shows (32%) round out the top 6 information sources for American travellers when selecting a vacation destination
- Travellers specifically interested in Newfoundland and Labrador showed similar tendencies in their use of travel information sources, with the same sources having the greatest influence as for all Americans
  - Some information sources, including destination-specific sources (shows, articles in magazines, guide books, websites), advertising (TV, print, online) as well as social media and travel review sites are being used more extensively

## Information sources with the most influence on travellers' selection of a vacation destination

(% of American travellers who indicated the source as most influential on their decision)

- Word of mouth (20%)
- Travel deals, discounts, special promotions (15%)
- Destination-specific websites (8%)
- Travel review websites (8%)
- Travel guides and books (6%)



# Information Sources for Trip Planning



Base: US travellers (n=526)

C3A. Generally, what sources of information influence your decision when selecting a destination for a vacation/pleasure trip?

# Trip Planning Horizon

## Timing of travel research before start of a vacation trip



Base: US travellers (n=526)

C4. After deciding on a destination for a vacation/pleasure trips, how far in advance of departure do you usually start researching the details for your trip?

### Planning in advance is common among American travellers

- Over half of US travellers start planning their trip 1 – 5 months in advance of departure, including 30% who plan at least 1 month in advance
- Another 3 in 10 Americans (32%) plan even further ahead, starting to research their trips 6-12 in advance of departure
- There are few Americans who either only take a very short time or longer time to plan
  - Only 2% start planning 2 weeks ahead of departure
  - 6% start planning more than a year ahead of departure

# Trip Booking Preferences

## **Advance online booking of transportation and accommodation is a common preference among American travellers**

- When it comes to booking transportation to and from a destination as well as booking paid accommodations for a vacation trip, US travellers have a definite preference for booking these in advance, with 9 in 10 Americans doing so
  - Transportation options during the trip are kept a little more flexible, with 87% of travellers booking in advance and 15% of travellers also booking while on the trip
  - Online booking of these trip components is the preferred option for at least 7 in 10 travellers while over-the-phone booking is slightly more popular than in-person booking
- Travellers keep their options open when it comes to activities, attraction visits and special events or shows during their vacation, with nearly 7 in 10 booking these while travelling. Special events and certain activities at the destination also have a relatively high pre-booking rate, with nearly half of travellers doing so
  - Travellers are almost equally likely to book/purchase activities, special events and attraction visits in person and online whereas only about 1 in 10 travellers book over the phone

# Trip Booking Preferences

Transportation			Paid accommodations	At the destination		
To destination	From destination	During the trip		Activities	Ticket to special events/shows	Tickets to attractions

## Time of booking:

<b>Before departure</b>	97%	94%	87%	90%	47%	49%	40%
<b>During the trip</b>	3%	7%	15%	13%	67%	64%	72%

## Booking preference:

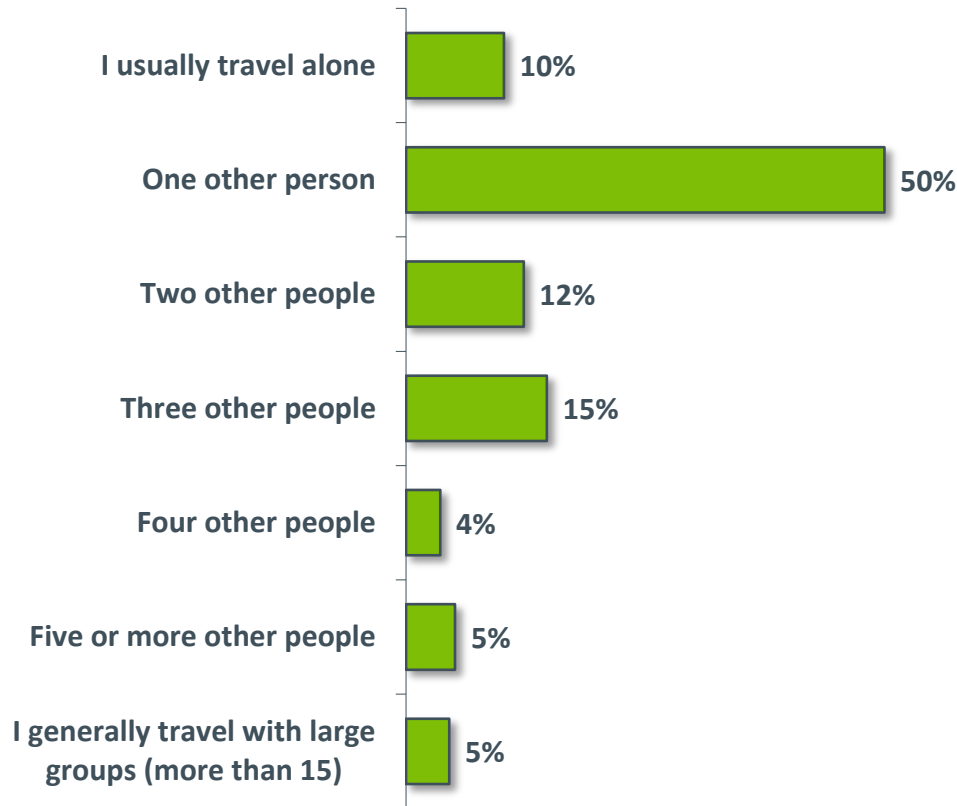
<b>Online</b>	83%	71%	69%	74%	42%	46%	41%
<b>Telephone</b>	11%	18%	15%	14%	15%	13%	10%
<b>In person</b>	6%	11%	16%	12%	44%	41%	49%

Base: US travellers (n=526).

C5A. When do you generally book the following **vacation/pleasure trip** components?

C5B. How do you prefer to book these trip components?

# Travel Party Size



## Americans like company when travelling

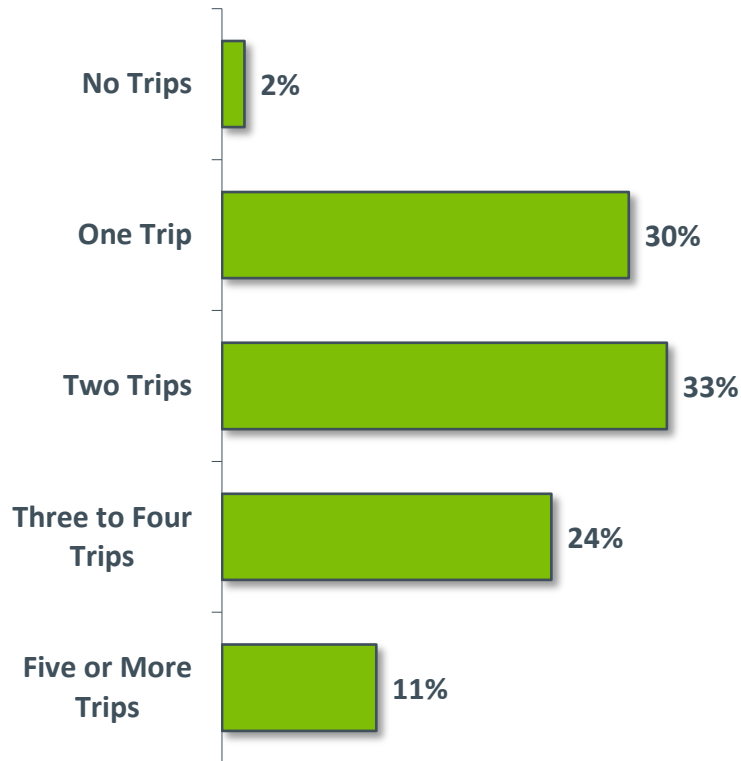
- 90% of US travellers generally go on vacation with other people, including half (50%) who travel with just one other person
  - 60% of those travelling with others are on vacation as couple(s) with no children
  - One fifth of Americans (20%) travels with children
  - Another 20% generally travel with an extended group of people, including 10% who travel with family and 8% with friends
- Nearly one third of Americans travel in groups of 3 to 5 people while only a small portion takes off on vacation with large groups of more than 15 people (5%)

Base: US travellers (n=505) "Unsure" responses removed

C6. With how many **other** people do you usually travel on **vacation/pleasure trips**?

# Travel Intensity

## Average number of vacation trips per year (past 3 years)



### On average, US travellers take about 2.6 vacation trips a year

- Over two thirds of US travellers (68%) take, on average, 2 or more vacation trips per year, including 35% of American travellers who take 3 or more trips
- About one quarter of US travellers are off on vacation 3 to 4 times a year while a much smaller portion – 11% - are avid travellers with 5 and more trips
- At 30%, the second largest proportion of American travellers, takes just one vacation trip a year
- Among American travellers, residents of the Pacific and South Atlantic regions tend to travel more while residents of the Mountain and South Central regions tend to go on fewer trips

Base: US travellers (n=504); "Don't know" responses removed

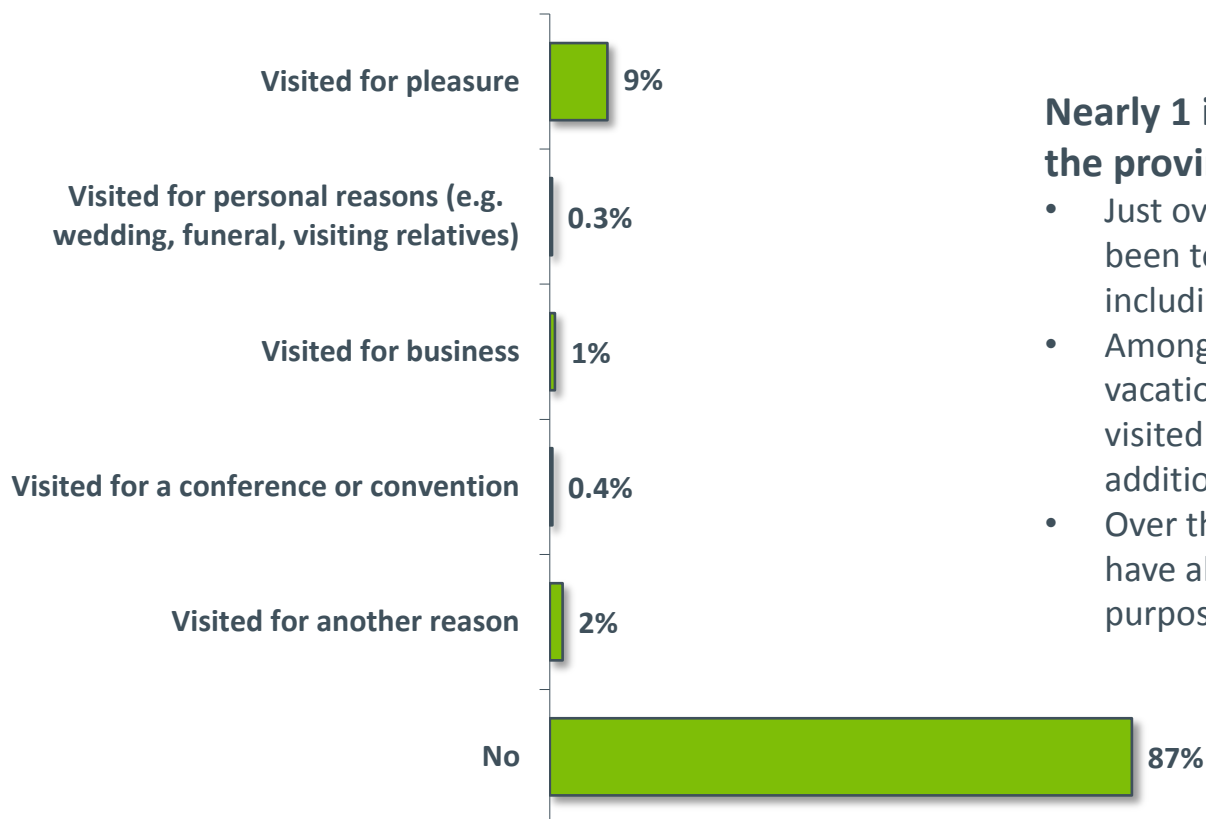
C8. Thinking about the past three years, how many vacation/pleasure trips did you take, on average, per year?



## **6 - Vacation Destination Newfoundland and Labrador**

# Newfoundland and Labrador Travel Incidence

## Visits to Newfoundland and Labrador by American travellers



### Nearly 1 in 10 US travellers have visited the province on a vacation trip

- Just over 1 in 10 American travellers have been to Newfoundland and Labrador, including 9% who visited for vacation
- Among those who have not visited for vacation but have been to the province, 1% visited for business purposes and an additional 2% visited for other reasons
- Over three quarters of vacation visitors have also been to the province for another purpose

Base: US travellers (n=526)

D6A. Have you ever travelled to the province of Newfoundland and Labrador just for vacation or pleasure?

D6B. Have you ever travelled to the province of Newfoundland and Labrador for another purpose?



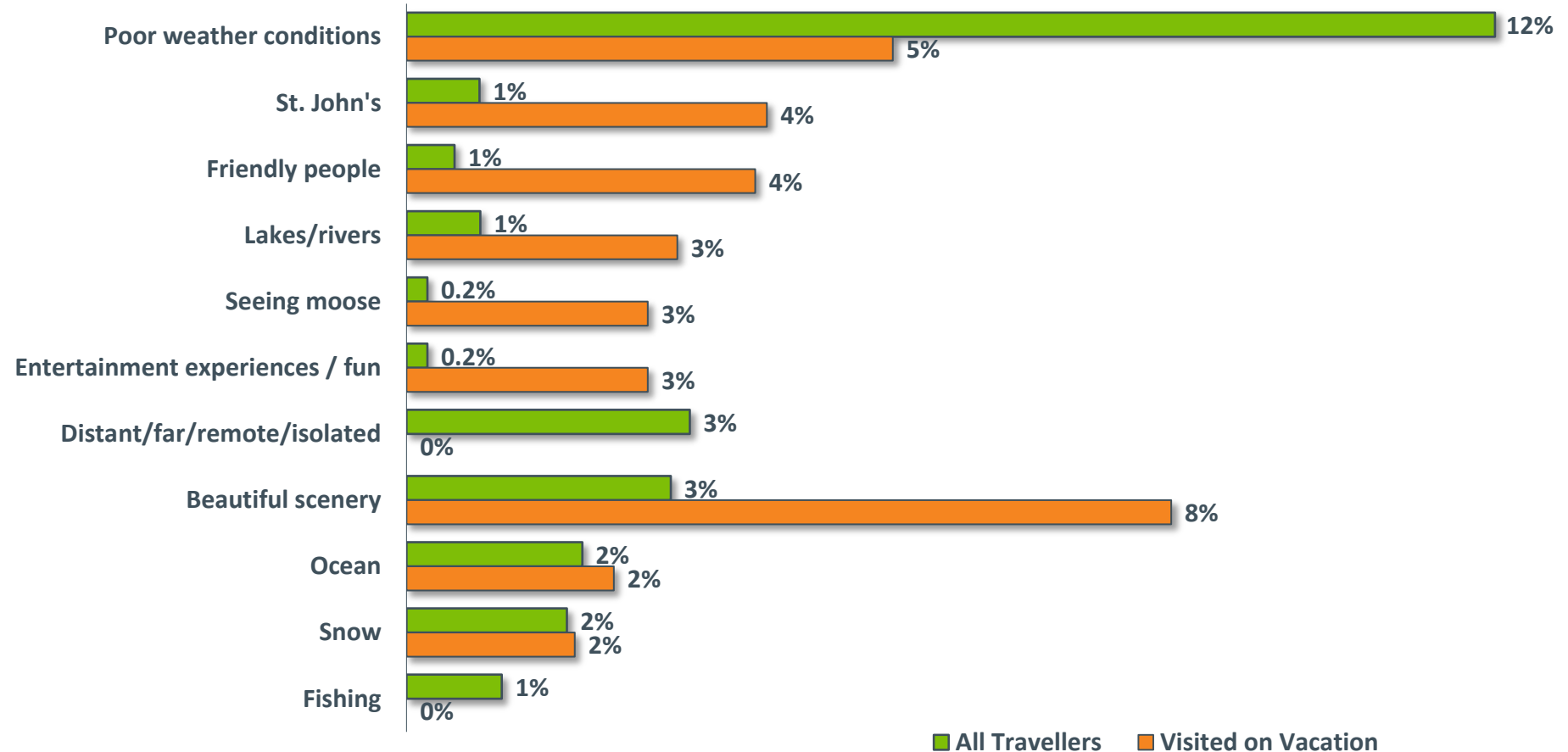
# Vacation Destination: Newfoundland and Labrador

## Americans have varied associations with Newfoundland and Labrador as a vacation destination

- Although half of respondents did not provide an answer, those US travellers who did, have a variety of top of mind associations about the province as a vacation destination
  - “Poor weather conditions” is the top association among all US travellers with 12% of mentions and surprisingly – albeit at a much lower extent – , it is also the second most mentioned association among those who have visited the province on vacation (5%)
  - Among those who have visited the province on vacation before, “beautiful scenery” comes to mind first (8%) but it also resonates with travellers overall (3%)
- US travellers also feel that the province is “distant/far/remote/isolated” when they think of the province
- The ocean, snow and fishing also come to the minds of US travellers
- It is noteworthy that among American travellers who have previously visited NL on vacation, the top of mind associations with the province are considerably different compared to all travellers in general
  - In particular, St. John’s, ‘friendly people’, ‘lakes/rivers’ and ‘seeing moose’ have a stronger top of mind presence than among all travellers
- Fishing, on the other hand, is a top of mind thought among travellers in general (1%) but does not feature in the top of mind associations of those who have already experienced the province

# Vacation Destination Newfoundland and Labrador

## Top of mind associations with Newfoundland and Labrador as a vacation destination



Base: US travellers (n=526); Visited NL on Vacation (n=48) **Caution – small sample size**

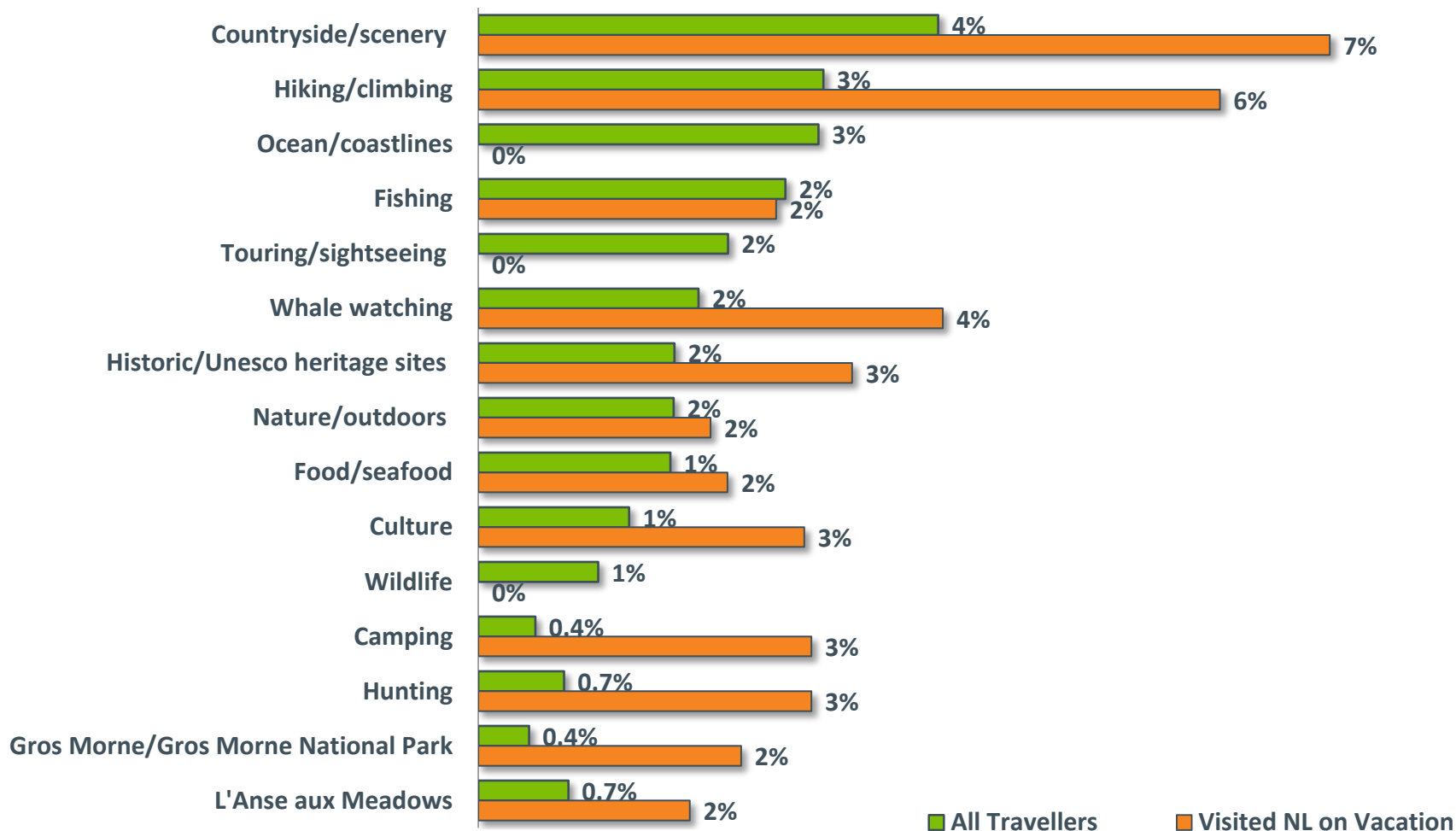
D1. Thinking about Newfoundland and Labrador as a **vacation destination**, what comes to mind first?

# Desired Vacation Experiences in Newfoundland and Labrador

## Scenery, ocean and hiking are top draws to the province for US travellers

- When it comes to visiting NL for vacation, American travellers are looking for a variety of experiences
- The scenery, seeing the ocean/coastlines, hiking and fishing are the top vacation experiences American travellers are seeking in the province
  - Among those who have already visited NL on vacation, seeing the scenery as well as hiking top their list by far, with whale watching completing the top 3 desired experiences of this traveller segment
- Touring, whale watching, historic sites and nature are also popular choices among US travellers
- Gros Morne and L'Anse Aux Meadows are the only two specific locations/attractions travellers want to see, with the desire to visit these attraction much greater among those who have visited NL previously
- While travellers overall were more general expressing their desired experiences, those who have already visited are significantly more specific
  - This applies in particular to seeing the scenery, hiking and whale watching as well as to some niche activities such as camping and hunting
  - More knowledge of the province due to a previous visit could also be the reason for the greater extent of seeking cultural experiences
  - It should be noted that the choices of desired vacation experiences are likely impacted by previous travel to the province as travellers pick those experiences that they either may not have had a chance to do or see during their previous trip or would like to see again to explore in more detail

# Desired Vacation Experiences in Newfoundland and Labrador



Base: US travellers (n=526); Visited NL on Vacation (n=48) **Caution – small sample size**

D4. If there was one thing that you would really like to see or do in Newfoundland and Labrador, what would it be?

# Impressions of Newfoundland and Labrador

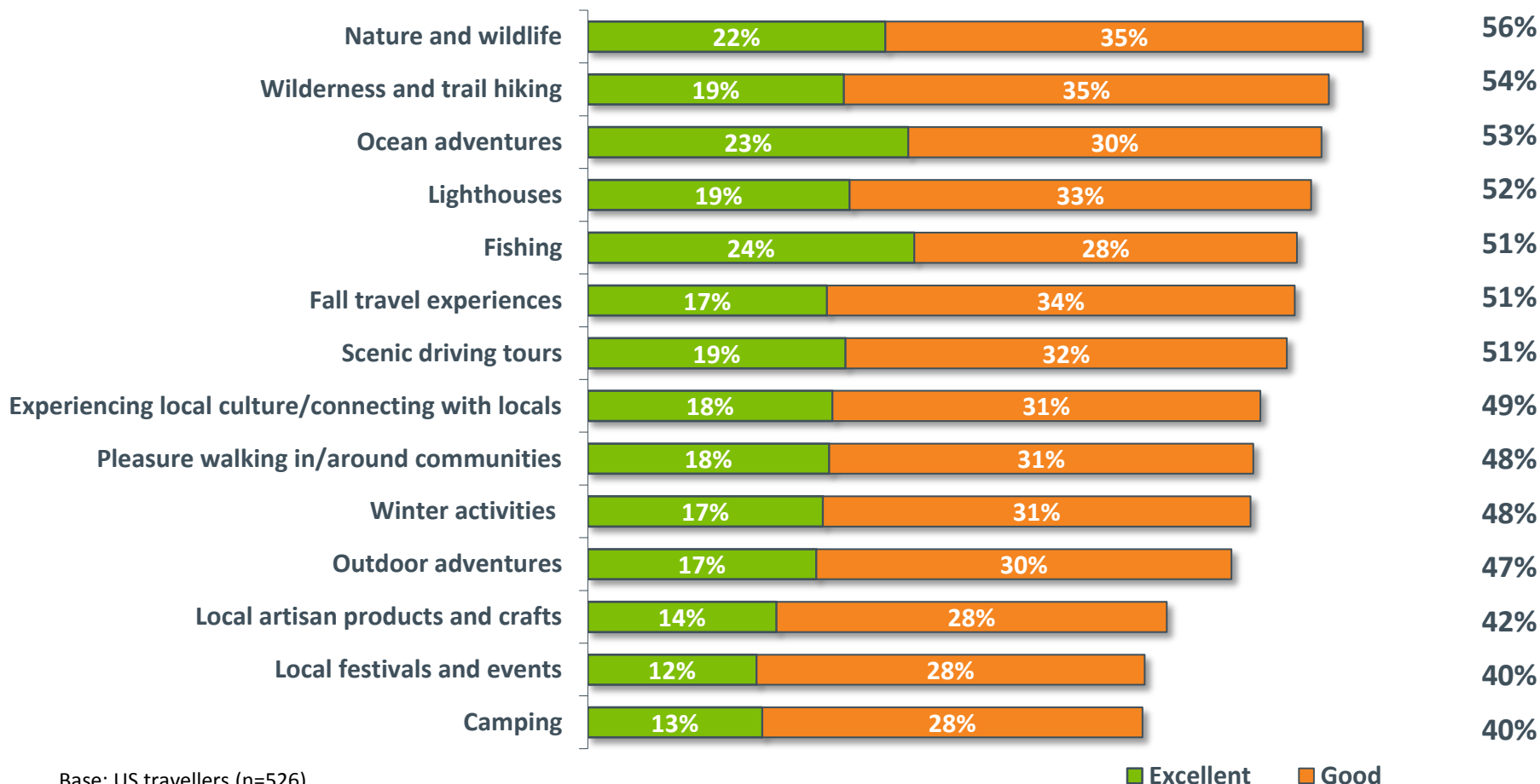
## US travellers have a generally positive perception of the province's vacation offerings

- American travellers perceive the province strongly with respect to nature and wildlife, hiking and the ocean, with over half of them rating these experiences as “excellent” or “good”.
- Fishing (24%), ocean adventures (23%) and nature and wildlife (22%) are particularly well perceived, with nearly one quarter of Americans rating their impressions of NL as ‘excellent’
- The province is rated highly by more than half of Americans for the experiences it has to offer which connect travellers with the destination:
  - Scenic touring (51% rating ‘excellent’ or ‘good’)
  - Local culture, connecting with local people (49%), local artisan products (42%), local festivals and events (40%)
  - Pleasure walking in communities (48%)
  - Other experiences that help the traveller connect with a destination, including historic sites and attractions (35%) and culinary experiences (34%), are perceived well by just over one third of Americans
- Fall (51%) and winter travel (48%) rate as excellent/good vacation experiences for about half of Americans
- With high ratings given to experiences that appeal to generally smaller segments of Americans, the province is well positioned to attract US travellers for certain niche activities/experiences such as fishing, trail hiking, experiencing nature and wildlife as well as ocean adventures
- The impressions of Newfoundland and Labrador are considerably stronger across all experiences for those who have visited than for those who have never visited and are also much stronger for those interested in visiting compared to those not interested in visiting

# Impressions of Newfoundland and Labrador

## Top rated vacation activities and experiences in Newfoundland and Labrador

Top 2 Box<sup>1</sup>



Base: US travellers (n=526)

Note: <sup>1</sup>Top 2 Box refers to a rating of 'Excellent' or 'Good' on a 5-point excellence scale

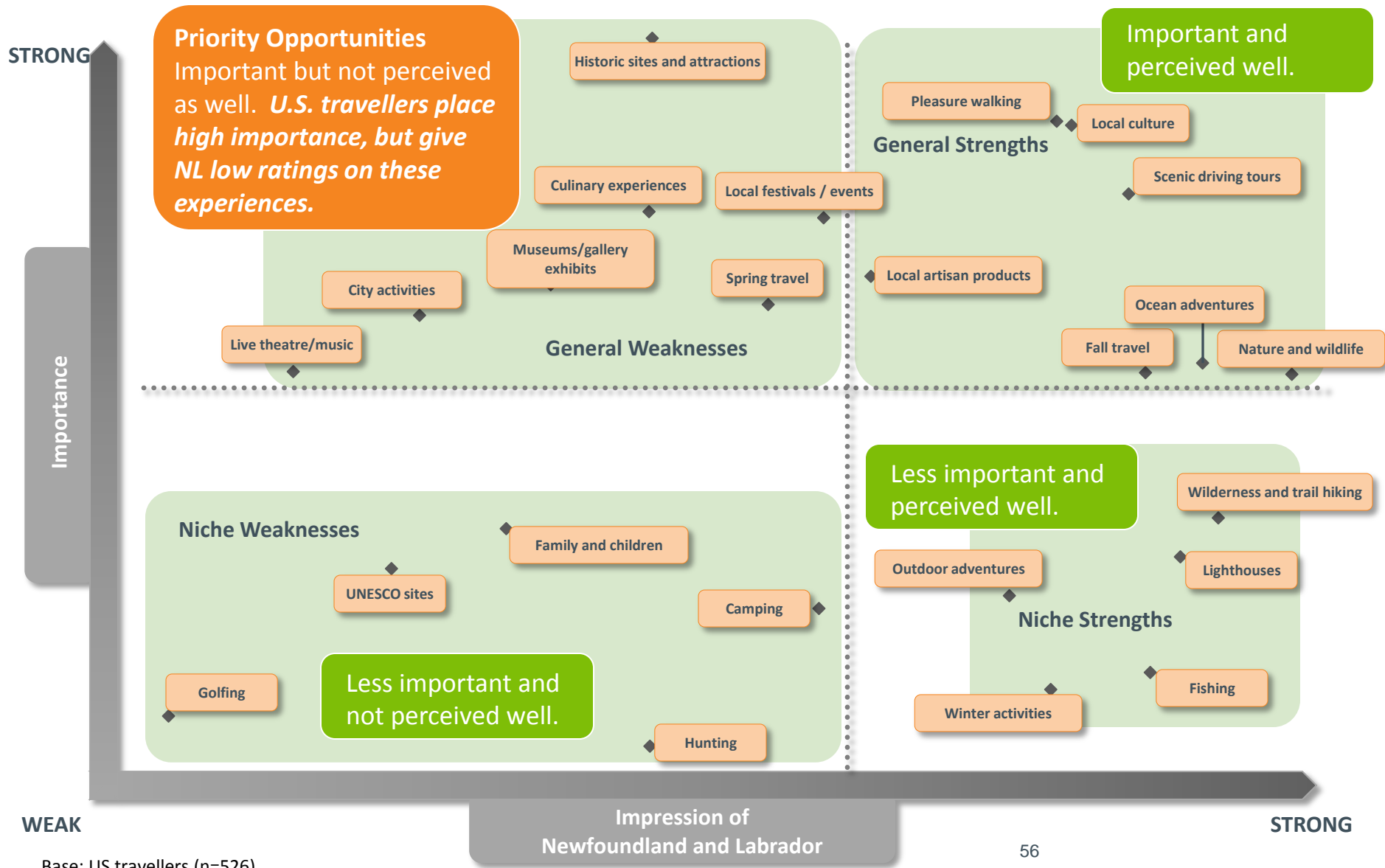
D5. Based on your personal experience, or your general impressions from anything you have seen, read or heard, how would you rate Newfoundland and Labrador on the following;

# Vacation Experiences in Newfoundland and Labrador

## Connecting desired vacation experiences and impressions of the province provides insights for developing opportunities

- The strengths and weaknesses map plots the importance of experiences against travellers' impression of Newfoundland and Labrador on those experiences
- The four quadrants indicate strengths and weaknesses for both general interest and niche experiences
  - General strengths are items that are both important and on which NL is rated highly
  - General weaknesses are items important to travellers but travellers do not perceive NL to be strong in those areas
  - Niche strengths are areas with less importance to travellers, where NL is high performing
  - Niche weaknesses are both less important to travellers and lower performing for NL
- The map shows that the province has a well perceived offering that allows travellers to connect with the destination, together with opportunities to experience the ocean, nature and wildlife
  - The availability of these experiences in combination makes NL unique as a place to visit
  - The province is also an attractive offer for American travellers for some niche experiences such as hiking, outdoor adventures, fishing and winter activities
- General weaknesses identified for Newfoundland and Labrador are local festivals, spring travel, historic sites, culinary experiences, city activities, museums and galleries, live theatre and music
  - These represent priority opportunities for experience development to make NL more attractive as a vacation destination for those travellers to whom these experiences are important when choosing a vacation destination
  - It appears that a combination of local festivals/events and spring travel have the greatest development potential for attracting American travellers, especially as there are already many established events that are taking place in the spring

# Vacation Experiences in Newfoundland and Labrador: Strengths and Weaknesses Map – US Travellers



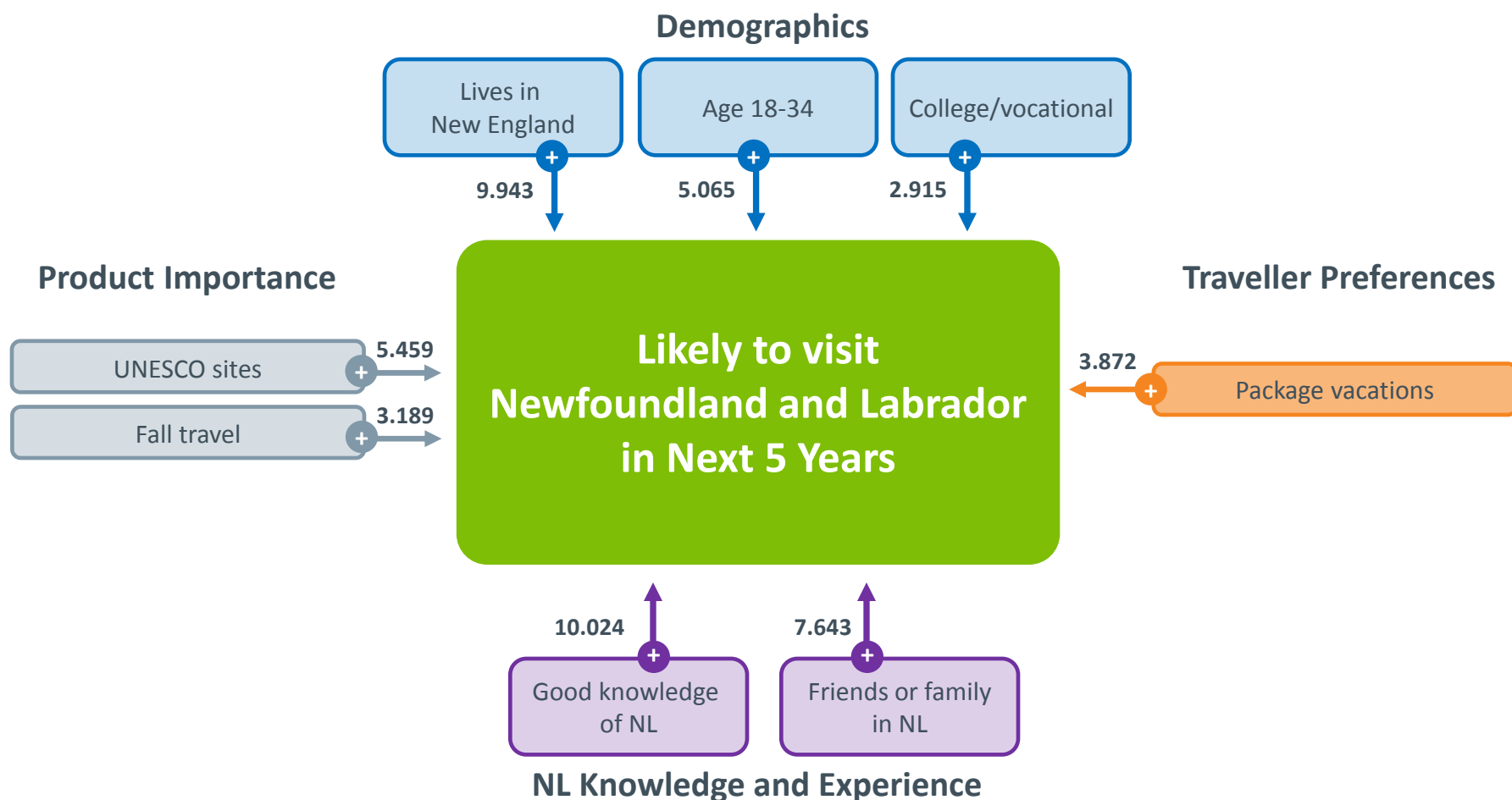


# Key Drivers of Visitation to Newfoundland and Labrador

## Knowledge of the province is a key driver for visitation

- The chart on the next slide shows the key drivers of US travellers' intent to visit Newfoundland and Labrador within the next five years
- Having a connection to the province is a strong indicator of Americans' intent to visit the province. This connection is either established through possessing information about the province or knowing somebody in the province
  - The strongest variable driving travellers' intent to visit is knowledge of Newfoundland and Labrador; however, this variable may be working both ways as highly interested travellers are likely to seek out information about the province as part of their trip planning
  - Having friends and family in the province can also catalyze travel to the province. US travellers with this characteristic are nearly eight times more likely to visit the province compared to US travellers overall
- Interest in UNESCO designated heritage sites as well as fall travel experiences are also drivers of travel intent
  - While fall travel is perceived strongly for the province and is of importance to nearly half of US travellers when deciding on a travel destination, interest in UNESCO sites is a niche interest, likely to appeal to a segment of travellers with very specific interests
- Traveller characteristics as positive drivers
  - US travellers residing in New England are substantially more likely to visit the province, possibly due to the relative closeness of NL to the region and higher awareness of the province
  - It appears that millennials (18-34 years) are also more likely to visit the province which could, in part, be attributed to the fact that this segment has generally a higher interest in all travel destinations investigated in this survey. As well, this age group has taken more trips on average, over the past 3 years than other age groups and is also more likely to travel in the future than other age segments
  - Travellers with a strong preference for vacation packages are also more intent on visiting this province

# Key Drivers – Intent to Visit Newfoundland and Labrador



Base: US travellers (n=526)

Note: Numbers are odds ratios. If >1, the odds ratio is the factor by which the odds of being interested in visiting the destination increase as the independent variable increases; if <1, it is the factor by which the odds of being interested in visiting decrease.

# Travel Barriers for Newfoundland and Labrador

## Low levels of knowledge is a main reason for not having vacationed yet in NL

- Over 4 in 10 US travellers who have never visited the province for vacation indicated that not knowing anything about the province was holding them back
- Interest in other destinations (32%) and low interest in this province (31%) were the reasons for about one third of US travellers for not having visited for vacation yet
- Cost (16%) and time to travel to the province (15%) has kept fewer than 2 in 10 Americans away
- As well, fewer than 1 in 10 travellers found it too complicated to get here or were prevented by the cost of travel in the province
- Other reasons, such as personal reasons, not having had the time yet to come here or poor travel reviews, appear to be of lesser significance to the majority of US travellers
- Only a small number of travellers (5%) believe that they would not receive value for money by vacationing in the province

## Ease of getting to another destination made some US travellers change their travel plans

- Among American travellers who were planning or considering a visit to NL but went to another destination instead (9% of all travellers), ease of getting there as well as a better fit with travel budgets and less time to get there, were the main reasons for choosing an alternative destination
  - For some travellers, not having enough vacation time or better value for money were also reasons for changing their vacation destination while others changed plans to attend a specific event (family reunion, wedding, concert or festival)
  - A smaller portion of travellers changed their minds due to a specific activity they wanted to participate in (e.g. going to a beach, skiing, hiking, golf)
- For more than half of those who changed travel plans, alternative destinations included another province or territory in Canada (52%) while over 4 in 10 decided on a destination in the US (43%)

# Travel Barriers for Newfoundland and Labrador



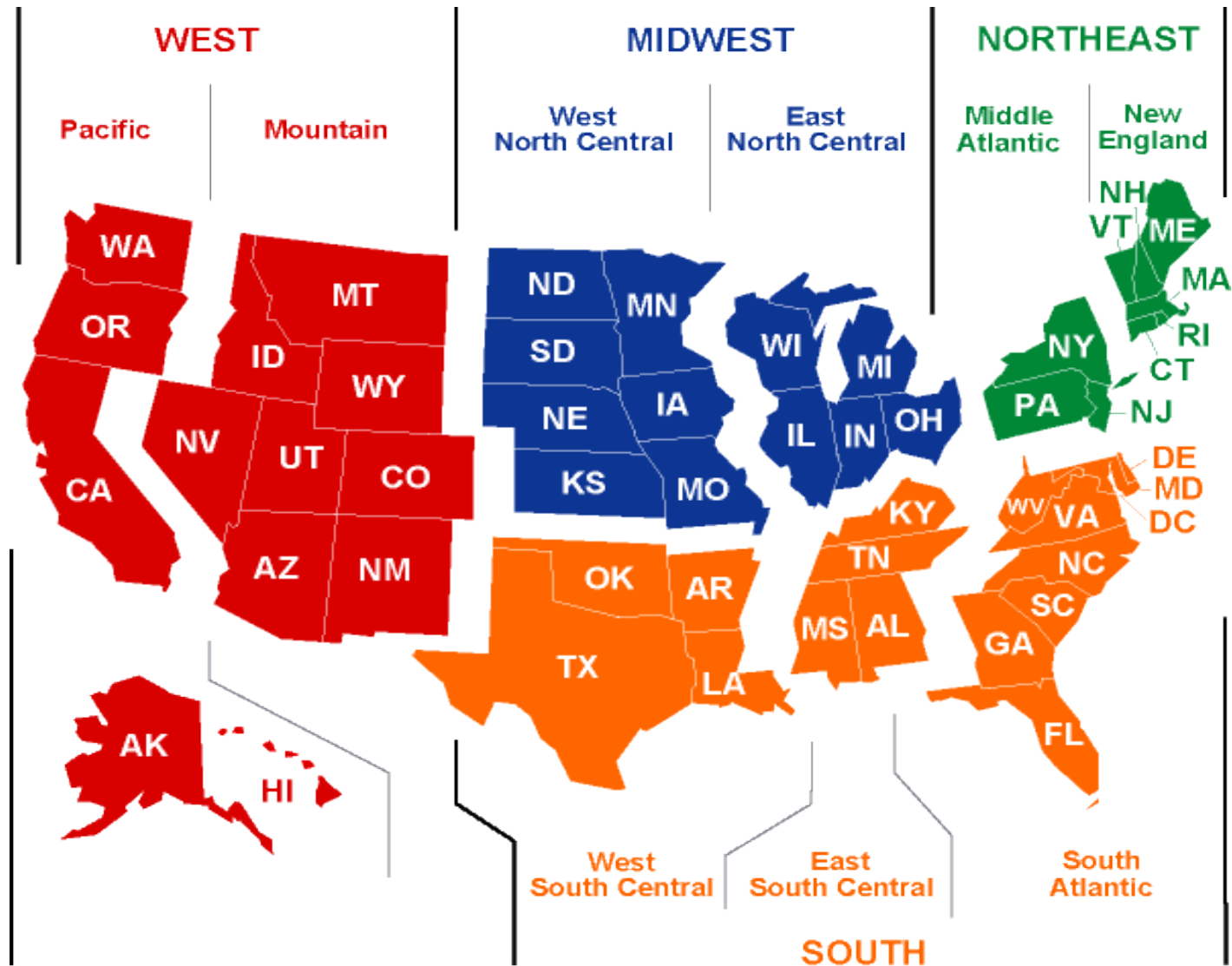
Base: US travellers who have never travelled to Newfoundland and Labrador for vacation purposes (n=478)

D7. Why haven't you travelled to Newfoundland and Labrador for vacation or pleasure?

## 7 – US Traveller Demographics

The bottom half of the slide features a series of overlapping, wavy bands in various shades of green, ranging from light lime to dark forest green. These bands create a sense of movement and depth. Above the bands, several thin, light green curved lines sweep across the white background, adding to the abstract, organic feel of the design.

# US Regional Map



# Traveller Demographics by Region

	TOTAL (n=526)	Northeast (n=113)	Midwest (n=125)	South (n=177)	West (n=111)
<b>Age:</b>					
18 to 24	6%	5%	4%	5%	8%
25 to 34	12%	14%	11%	11%	16%
35 to 44	13%	13%	17%	13%	10%
45 to 54	12%	8%	12%	14%	14%
55 to 64	21%	22%	27%	24%	11%
65 to 74	28%	33%	23%	28%	31%
75+	7%	5%	7%	7%	11%
<b>Gender:</b>					
Male	50%	51%	45%	49%	54%
Female	50%	49%	55%	51%	46%

Base: US travellers (n=526)

S2. In what year where you born?

S3. Are you (Gender)?

# Traveller Demographics by Region

	TOTAL (n=526)	Northeast (n=113)	Midwest (n=125)	South (n=177)	West (n=111)
<b>Household Size:</b>					
Mean	2.4	2.5	2.4	2.4	2.4
<b>Children in Household:</b>					
% of Households w/ children under 18	26%	31%	28%	25%	21%
<b>Education:</b>					
High school or less	10%	8%	14%	9%	11%
Community/ technical college/ vocational training	22%	22%	20%	23%	23%
University degree	36%	42%	36%	34%	35%
Post-graduate degree	32%	29%	31%	33%	31%

Base: US travellers (n=526)

E2. How many people live in your household?

E3. How many people in your household are 17 years or younger?

E4. What is the highest level of education that you have completed?



# Traveller Demographics by Region

	TOTAL (n=526)	Northeast (n=113)	Midwest (n=125)	South (n=177)	West (n=111)
<b>Income:</b>					
Less than \$40,000	15%	14%	14%	16%	17%
\$40,000-\$69,999	25%	28%	20%	27%	23%
\$70,000-\$99,999	25%	26%	29%	25%	20%
\$100,000-\$149,999	19%	17%	22%	15%	24%
\$150,000 or more	10%	11%	9%	10%	9%
<i>Prefer not to say</i>	7%	5%	6%	7%	7%
<b>Close Friends or Relatives in Newfoundland and Labrador:</b>					
Yes	4%	5%	1%	6%	3%

Base: US travellers (n=526)

E5. Which of the following categories best corresponds to your total annual household income before taxes and deductions?

E1. Do you currently have any friends or family living in Newfoundland and Labrador?