

# Survey of Non-resident Visitors to Newfoundland and Labrador (Peak Season May to October 2022)

November 2022



# Background and Survey Methodology

- In November 2021, Newfoundland and Labrador (NL) launched its *Come Home 2022* campaign, inviting Canadians, including Newfoundlanders and Labradorians living away, to visit and explore the province. The 2022 Come Home year is a year-long “Festival of Festivals”, with a variety of events (e.g. culture, sports, music, theatre, etc.) scheduled throughout the province to celebrate the province’s culture, heritage and people, to encourage all visitors to explore this unique destination, and to provide an opportunity for residents and expats alike to reconnect with the place they grew up in and discover something new
- The Department of Tourism, Culture, Arts and Recreation conducted a survey with non-resident visitors to the province to find out about their trips during the peak season (May to October) 2022, including visit purpose, participation in activities and experiences, spending, use of accommodations, their personal connections to Newfoundland and Labrador as well as their awareness of *Come Home 2022* and the impact of Come Home year on their travel decisions
- The survey was conducted between May 18 and October 31, 2022 with non-resident visitors who were given survey invitations by staff at various sites and attractions across the province. Nearly 1,700 non-resident visitors responded to the survey on behalf of their travel party and provided details about their trips and experiences in the province. Survey respondents represent nearly 4,400 visitors during the peak season May to October 2022
- Due to the survey methodology, survey results cannot be generalized and are not representative of all non-resident visitors to the province during the 2022 peak season. However, overall, these results provide an insightful snapshot of non-resident visitation during this period as well as a strong sense of visitors’ trip experiences and perceptions of *Come Home 2022*

# Summary of Findings

## Peak Season Travel



The majority of survey respondents who visited NL during the peak season 2022 were from Canada and specifically from Ontario, visited for vacation, arrived by plane, started their trip during the June to August period, travelled as a party of two and were mostly 55 years of age or older



With an average length of stay of 12 nights, survey respondents were able to take in many of NL's sites and attractions, with local restaurants, historic sites and hiking/walking trails proving to be visitor favourites while hiking/walking, whale watching, sea bird watching and sightseeing boat tours were the most popular activities



Survey respondents represent more than 20,000 nights spent in the province during the peak season, with more than two thirds of these nights spent in paid accommodations, contributing to an average in-province travel party spending of nearly \$4,200



While survey respondents reported high levels of satisfaction with most aspects of their trip, they encountered a number of issues impacting a potential return trip, including vehicle rentals, public transit, the state of provincial roads, and high costs

## *Come Home 2022*



While *Come Home 2022* was not the main motivator to take a trip here for nearly all survey respondents, many of them felt that the festivities contributed positively to their trip experiences and made them feel more welcome in the province

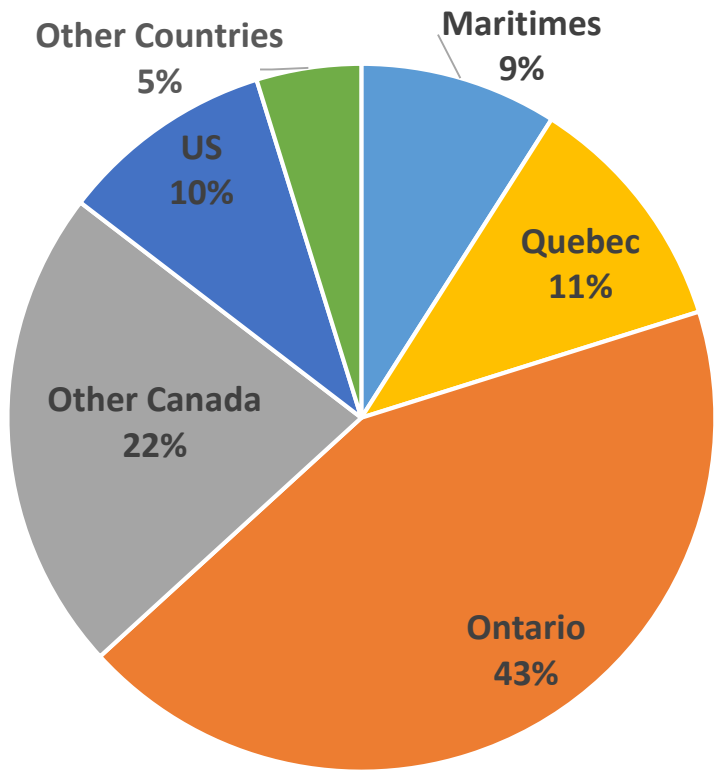
Those familiar with the province and personal connections to this place were much more likely to indicate that *Come Home 2022* resonated with them, as a result of which they did more, saw more, stayed longer and spent more money in the province than they would have otherwise. This was particularly the case among respondents who came here to visit friends or relatives

Nearly one in five survey respondents participated in specific *Come Home 2022* events or festivals, with 73% of these respondents indicating that they were highly satisfied with the events

# Visitor Origins

## Where do you currently reside?

Non-resident respondents (n=1,672)



### Canada total **85%**

- ON 50%
- BC 10%
- QC 13%
- NS 8%
- AB 11%

Of Canadian visitors



### United States total **10%**

- TX 11%
- MI 5%
- FL 9%
- CA 5%
- NY 7%

Of US visitors



### International total **5%**

- UK 25%
- Germany 21%

Of international visitors

- Survey respondents represent a wide range of origins, with Canadians comprising more than 4 in 5 (85%) survey respondents who visited the province during the peak season May to October 2022
- Visitors from the US represent 10% of survey respondents while 5% were from other countries
- Among Canadian survey respondents, 50% (by far the highest share) were visitors from ON, with visitors from QC (13%), AB (11%), BC (10%) and NS (8%) rounding out the top 5 origin provinces
- Survey respondents from the US represent 41 states, with 1 in 10 each visiting from Texas and Florida as top origins
- Visitors from the UK and Germany comprise nearly half of all other international survey respondents (other than the US)

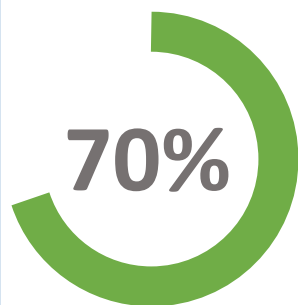
# Purpose of Trip to NL

***What was the main purpose of your overnight pleasure trip in Newfoundland and Labrador?***

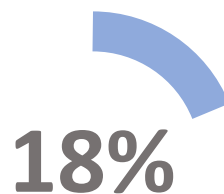
*Non-resident respondents (n=1,672)*



**Vacation**



**Visiting  
friends/  
relatives**



**Special  
event/  
occasion**



**Business/  
work**



**Weekend  
getaway**

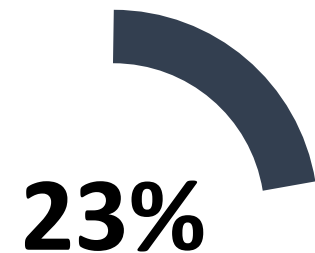
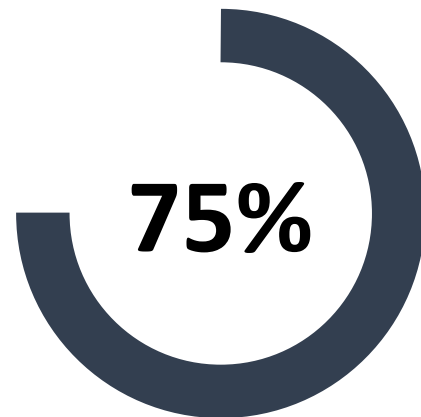


- When it comes to why survey respondents travelled to NL during the 2022 peak season, at 70%, vacation stands out as the most mentioned reason
- With the exception of Nova Scotia, visiting for vacation was the main purpose for respondents regardless of their place of residence
- 18% of respondents took a trip to NL to visit family or friends while 7% indicated that they came to the province for a special event or occasion, including *Come Home 2022*, weddings, anniversaries, honeymoons and birthdays
- 3% of survey respondents reported being here for a business or work related trip and just 1% visited for a weekend getaway
- Another 3% of respondents indicated personal or other reasons for their visit

# Mode of Travel

## *How did you travel to Newfoundland and Labrador?*

*Non-resident respondents (n=1,672)*

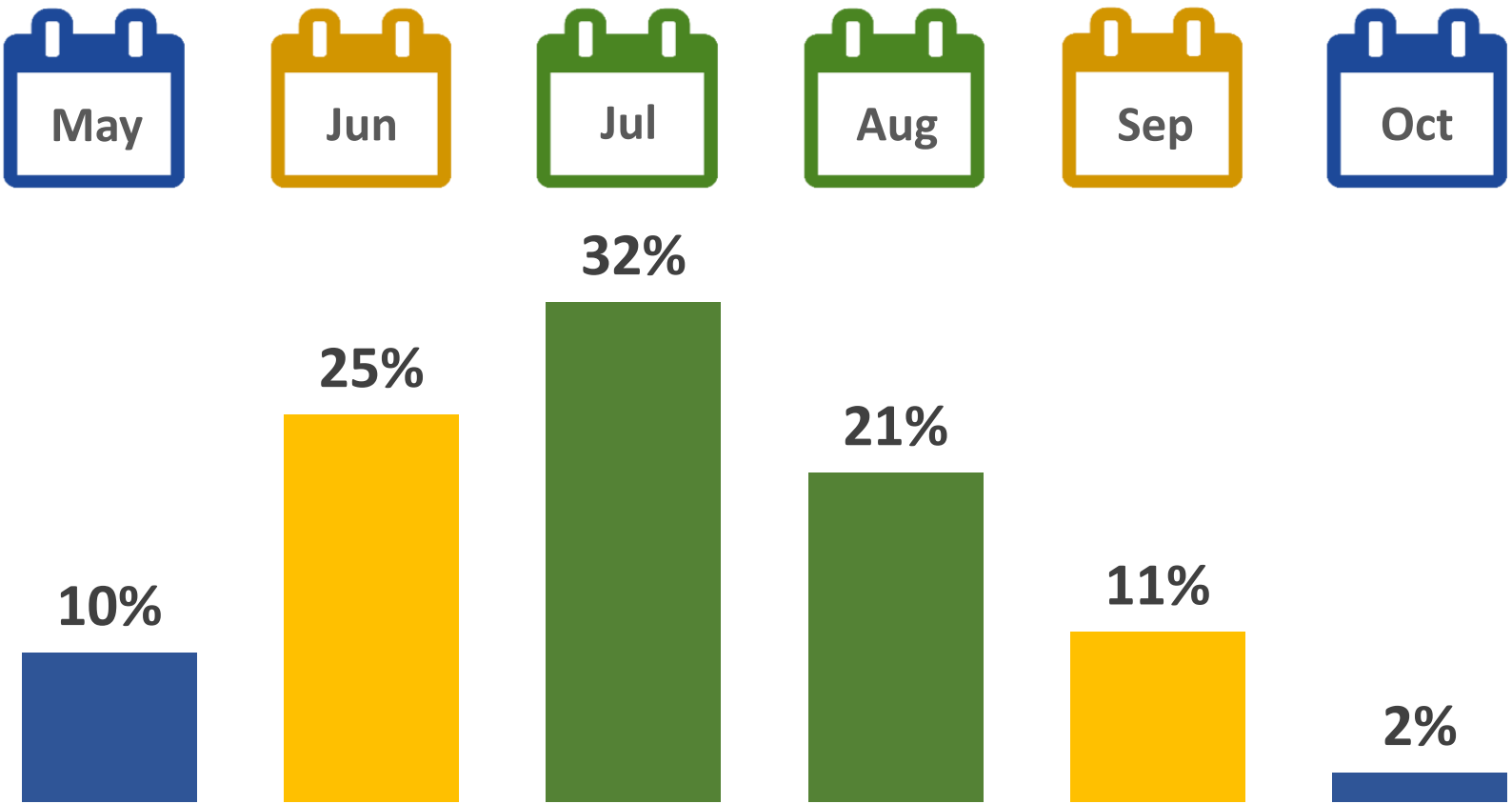


- The vast majority of survey respondents travelled to the province by air (75%) while 23% travelled to the province by vehicle (cars, SUVs, trucks, motorcycle, motorhome/RV)
- Respondents visiting friends or relatives were more likely to fly to the province than those visiting for vacation (89% vs. 69%) whereas those visiting for vacation were more likely to drive than those visiting friends or relatives (29% vs. 11%)
- A small share of survey respondents indicated that they travelled to the province by bus tour or by cruise ship/other vessel

# Time of Visit

*In which month did your overnight pleasure trip in Newfoundland and Labrador begin?*

*Non-resident respondents (n=1,672)*



- Survey respondents' trips started across all months of the 2022 peak season, with nearly a third of respondents (32%) beginning their trip in July
- 25% and 21% respectively of survey respondents started their trip in the province in June and August while 1 in 10 each arrived here in May and September
- Only 2% of survey respondents began their NL visit in October

Note: the distribution of trip starts reported by survey respondents is not a reflection of actual visitor volumes to the province during the peak season months

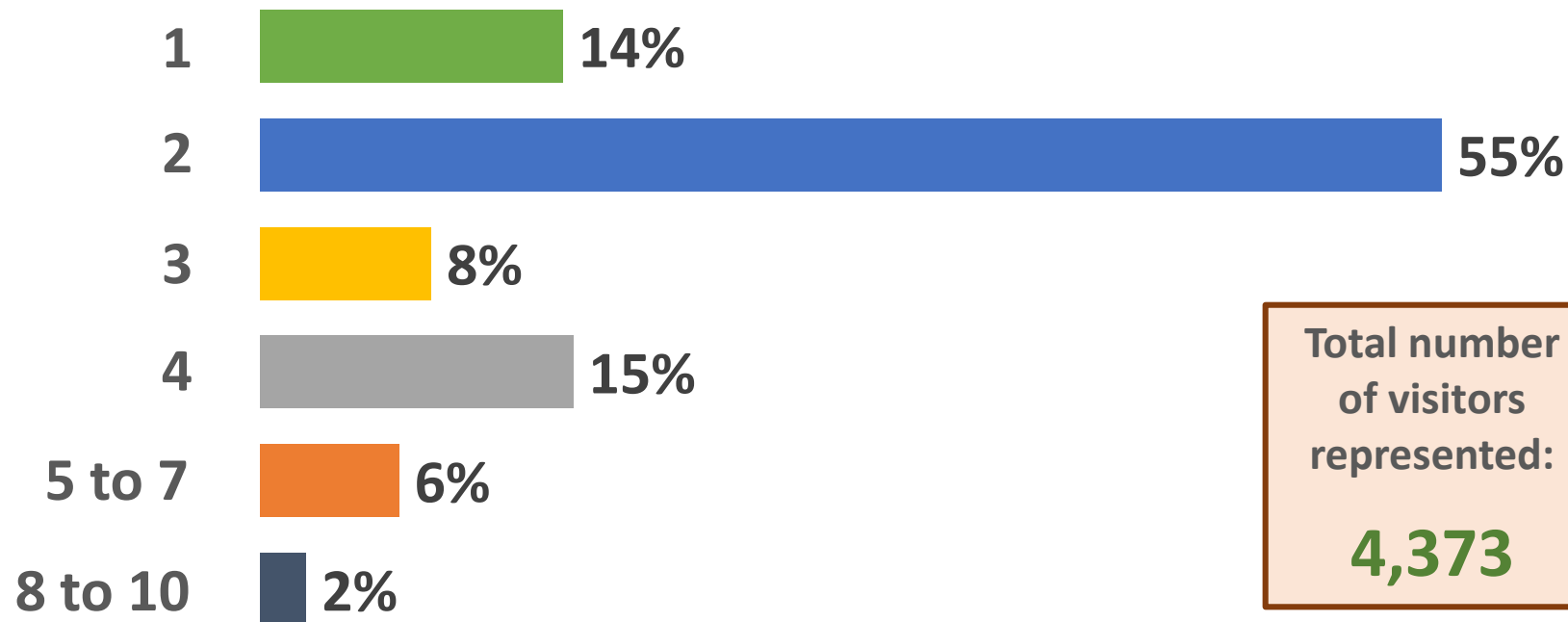
- More than half of survey respondents (55%) indicated that they were travelling as a party of two people
- Respondents were equally likely to travel alone (14%) or in a travel party of four people (15%)
- Another 8% of respondents reported a travel party of three people while larger travel parties of five or more people were less common among survey respondents
- Overall, the average travel party size of survey respondents was 2.6 people
- Survey respondents represent a total of nearly 4,400 visitors to the province during the peak season May to October 2022

# Party Size

*Including yourself, how many people are travelling with you as one travel party on this trip?*

*Non-resident respondents (n=1,672)*

## Number of people in travel party



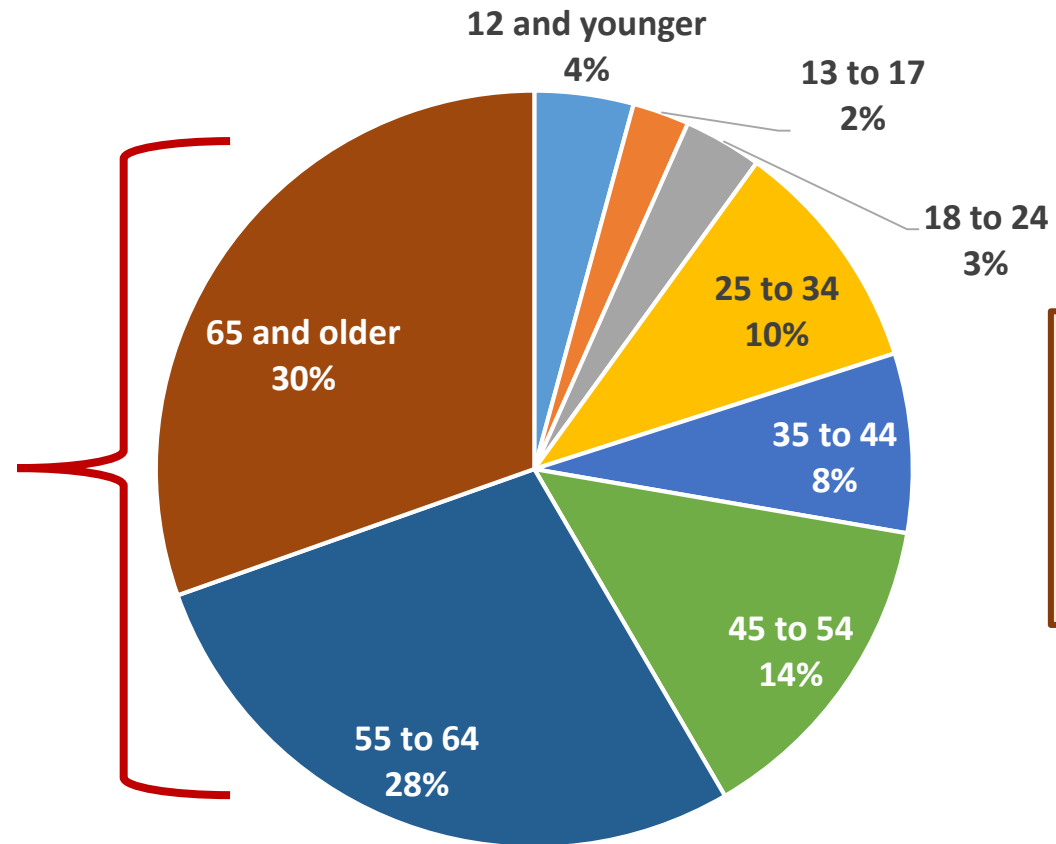
Total number of visitors represented:  
**4,373**



# Visitor Ages

*Including yourself, how many people in your travel party are ... [age group]?*

*Non-resident respondents (n=1,672)*



55 years or older:  
**58%**

Total number of visitors represented:  
**4,373**

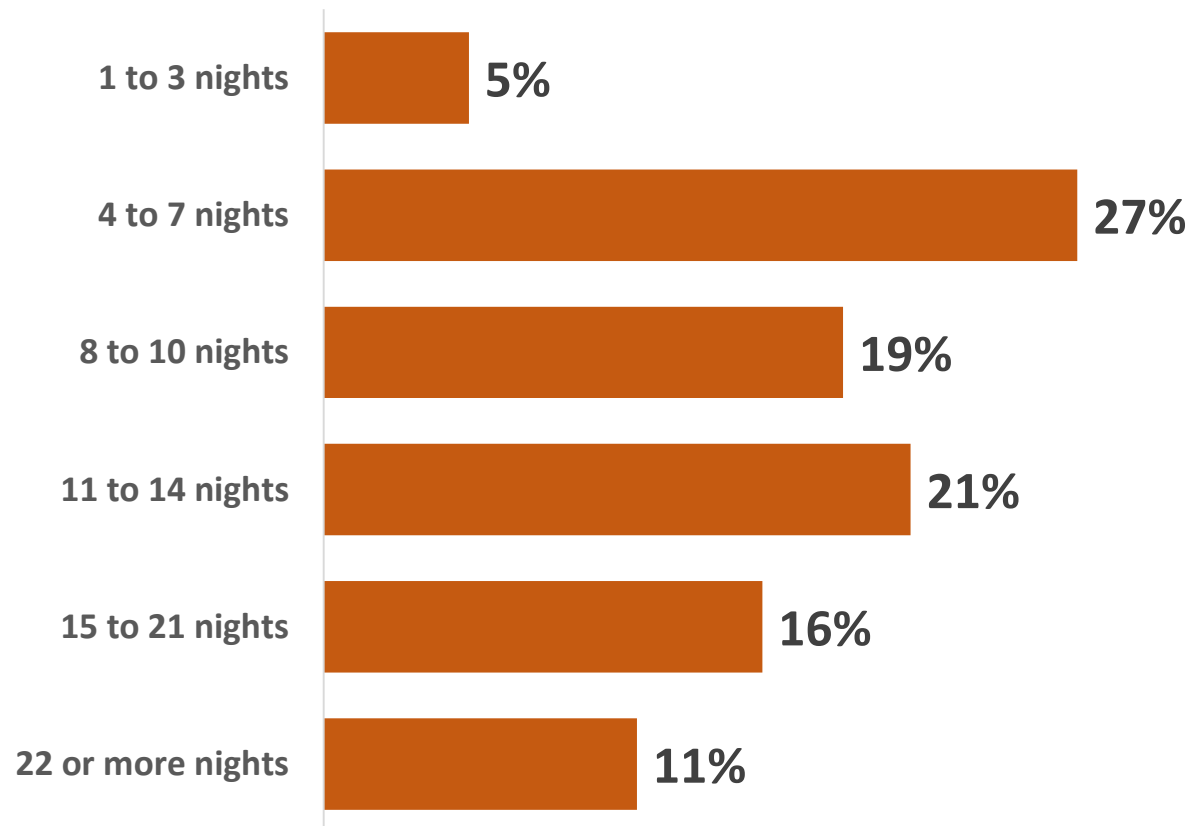
- Survey respondents and their travel companions tend to be older, with 3 in 10 visitors (30%) being 65 years or older while a similar share (28%) is between the ages of 55 and 64
- 14% of respondents are aged 45 to 54 while another 10% are 25 to 34 years old. Just 8% of respondents are 35 to 44 years old and only 3% are 18 to 24
- Only a small share of visitors represented by survey respondents are between the ages of 13 and 17 (2%) and 12 years or younger (4%)
- Vacation travel parties are generally older than VFR travel parties, with 66% of vacationers being 55 or older compared to just 38% of VFR visitors.
- VFR travel parties responding to the survey are much more likely to be in the millennial (18-34) age group compared to vacation respondents (18% vs 10%), and are much more likely to be travelling with children under 18 compared to vacation respondents (15% vs. 4%)

- Most commonly, survey respondents stayed 4 to 7 nights in the province during their trips, with over one quarter (27%) reporting that they did so
- One fifth of respondents (21%) stayed 11 to 14 nights in the province while a similar share of respondents (19%) reported shorter trips of 8 to 10 nights and nearly as many (16%) were in the province for 15 to 21 nights
- Survey respondents were twice as likely to have had longer trips of 22 or more nights (11%) rather than shorter trips of just 1 to 3 nights (5%)
- The average length of stay of all survey respondents was 12.0 nights, with respondents representing more than 20,000 nights spent in the province

# Length of Stay

***How many nights did you spend in Newfoundland and Labrador on this trip?***

*Non-resident respondents (n=1,672)*



*Average length of stay in NL*



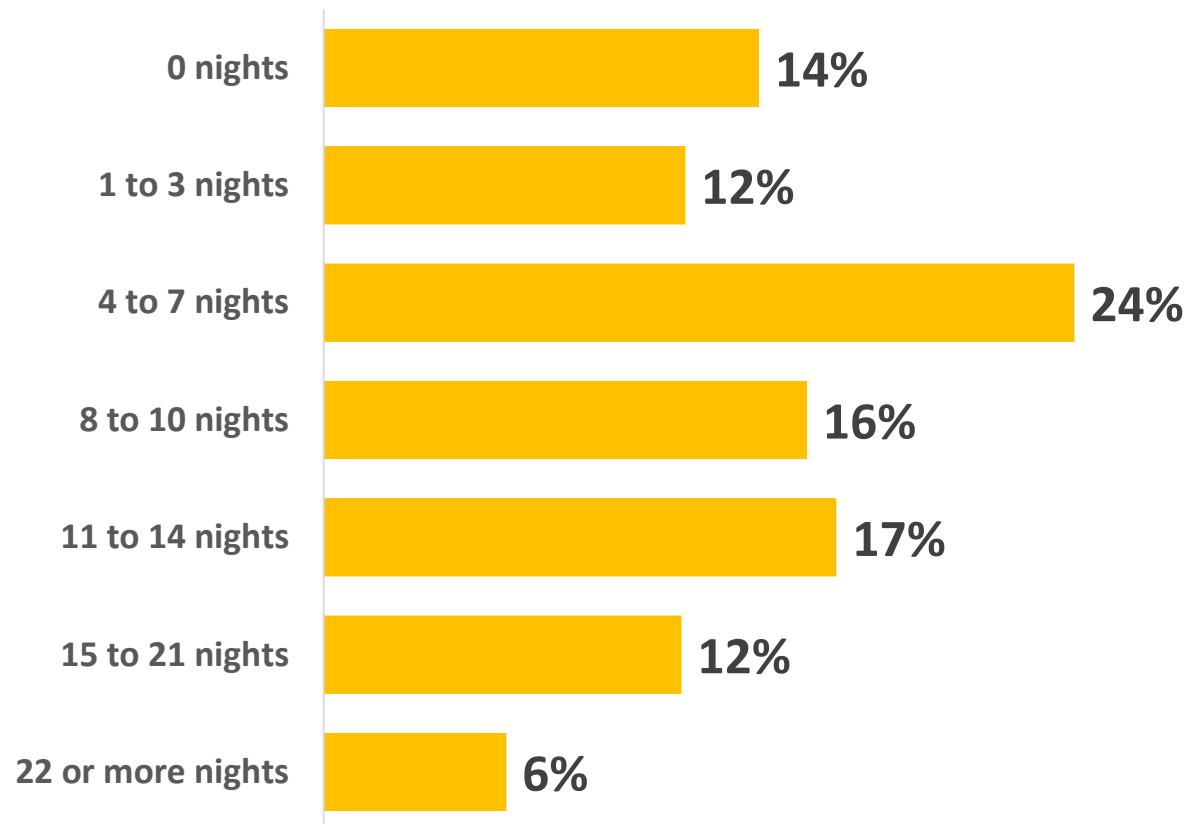
*Number of nights in NL*



# Stay in Paid Accommodations

*How many nights did you stay in paid accommodations during your overnight pleasure trip to Newfoundland and Labrador?*

*Non-resident respondents (n=1,672)*



*Average length of stay in paid accommodations*



*Number of nights in paid accommodations*



- Overall, the vast majority of survey respondents (86%) reported that they stayed at least one night in paid accommodations
- Most commonly, respondents (24%) stayed 4 to 7 nights in paid accommodations
- Nearly 1 in 5 survey respondents each reported 11 to 14 (17%) and 8 to 10 nights (16%) in paid accommodations
- 6% of survey respondents had longer stays of 22 or more nights in paid accommodations
- While 95% of respondents visiting for vacation stayed in paid accommodations, only 50% of respondents visiting relatives or friends did so
- Survey respondents spent an average of 8.5 nights in paid accommodations, representing more than 12,200 nights or 69% of the total nights they spent in the province

# Connections to NL

*Do you currently have any family/relatives or friends living in Newfoundland and Labrador?*

Non-resident respondents (n=1,672)  
% Yes



38%

*Are you originally from Newfoundland and Labrador but currently living outside the province?*

Non-resident respondents (n=1,672)  
% Yes



12%

*Have you visited Newfoundland and Labrador before?*

Non-resident respondents (n=1,478)  
% Yes



32%

VFR 98%  
Vacation 20%

44%  
3%

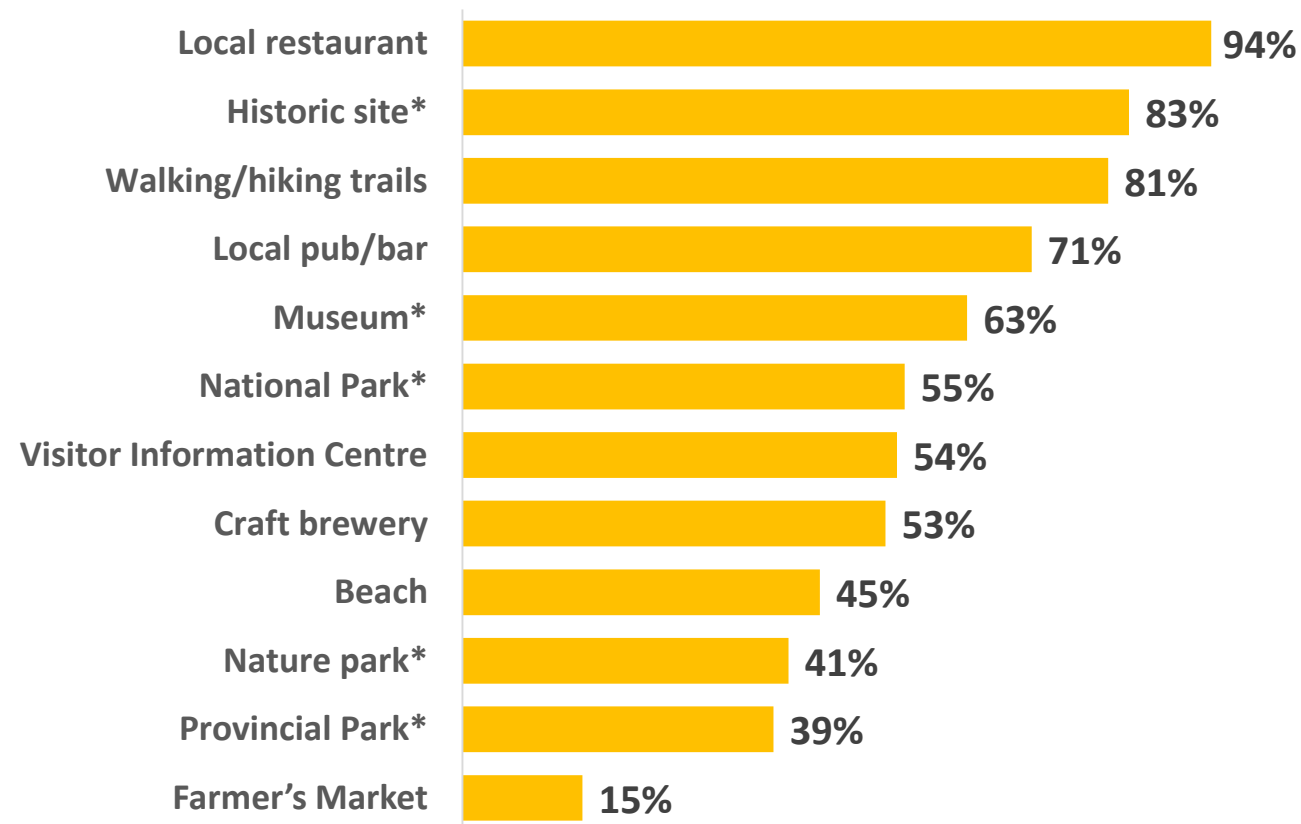
72%  
24%

- A fair number of survey respondents indicated that they have a connection to Newfoundland and Labrador
- Nearly 2 in 5 survey respondents (38%) reported that they have family/relatives or friends in the province while just over 1 in 10 (12%) reported that they are originally from the province but currently live elsewhere
- When it comes to having visited the province before, nearly one third of survey respondents reported that they have done so
- Not surprisingly, having a current connection to the province is significantly more likely among those respondents who visited relatives or friends in the province during the 2022 peak season
- While nearly all VFR respondents (98%) have family or friends here, 44% are originally from here and 72% have visited NL before. This compares to 20%, 3% and 24% respectively among respondents visiting for vacation

# Experiences and Attractions

## *Which of the following did you visit during your overnight pleasure trip in Newfoundland and Labrador?*

*Non-resident respondents (n=1,672)*



*Historic sites are of particular interest to survey respondents regardless of trip purpose*

**Vacation: 91%**  
**VFR: 75%**

Share of respondents by trip purpose who visited historic sites



\*Specific examples were provided during survey

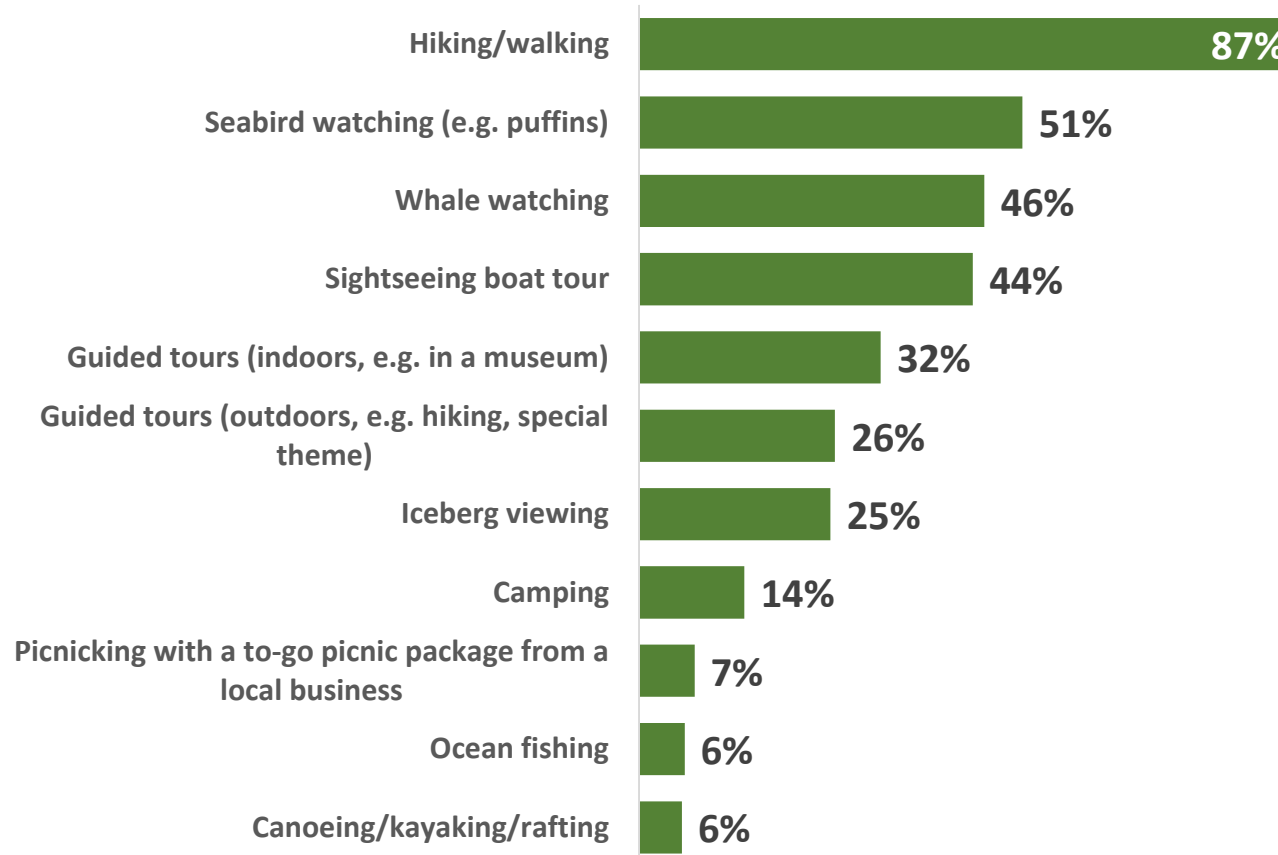
- Non-resident survey respondents visited various sites, places and attractions while travelling in the province during the 2022 peak season, with local restaurants topping the list at 94%
- With more than 4 in 5 respondents (83%) visiting, historic sites\* were particularly popular among visitors, even topping walking/hiking trails which were taken in by 81% of survey respondents
- While 71% of respondents visited a local pub/bar, nearly two thirds (63%) went to a museum
- A significantly higher share of respondents visited a National Park (55%) than visited a Provincial Park (39%), with nature parks drawing in 41% of survey respondents
- Craft breweries were also popular with survey respondents, with over half of respondents (53%) reporting that they visited one

\* Free entry to Provincial Historic Sites during their operating season

# Experiences and Attractions

*In which of the following activities did you participate during your overnight pleasure trip in Newfoundland and Labrador?*

*Non-resident respondents (n=1,672)*



*Hiking/walking is the most popular activity in which respondents participated regardless of trip purpose*

**Vacation: 90%**  
**VFR: 84%**

Share of respondents by trip purpose participating in hiking/walking



Only activities with participation of 5% or higher are shown

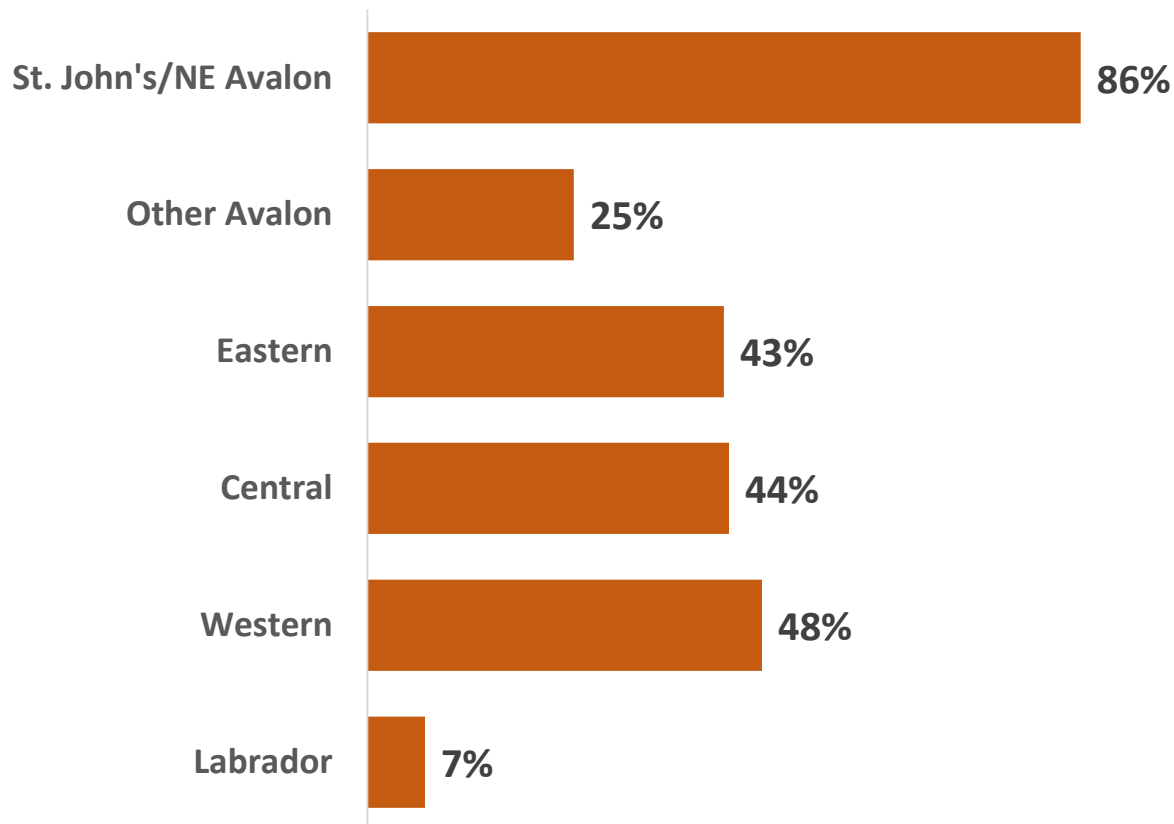
- Among survey respondents, hiking/walking was the most popular activity by far, with 87% of respondents reporting that they participated in this activity
- Seabird watching, whale watching and sightseeing boat tours were popular with about half of survey respondents
- While 32% and 26% respectively participated in guided tours indoors and outdoors, one quarter of respondents were able to take in icebergs
- Just over 1 in 10 survey respondents (14%) indicated that they went camping during their stays in the province while other activities such as ocean fishing and canoeing/kayaking/rafting were much less popular

- Not surprisingly, St. John's and the North East Avalon Peninsula area was the most visited region among survey respondents, with 86% of respondents indicating that they visited the area
- More than 2 in 5 survey respondents each visited the Eastern (43%), Central (44%) and the Western (48%) regions, with the Western region standing out as having some of the most visited communities/locations including Gros Morne, L'Anse aux Meadows, Rocky Harbour, Corner Brook, Deer Lake and St. Anthony
- Communities/areas generally popular with NL visitors were also popular with survey respondents, including the Bonavista Peninsula area (incl. Trinity), Gander, Twillingate and Fogo Island
- While one quarter of survey respondents indicated they visited other communities on the Avalon Peninsula, 7% reported visiting Labrador (Battle Harbour, Goose Bay, L'Anse-au-Clair, L'Anse-au-Loup)

# Destinations

***What were the primary destinations during your overnight pleasure trip in Newfoundland and Labrador?***

*Non-resident respondents (n=1,660)*



*Top destinations mentioned by survey respondents*

*St. John's  
Bonavista  
Peninsula area  
Gander  
Twillingate  
Gros Morne  
Rocky Harbour*



**Note: destinations respondents reported having visited is likely impacted by the survey methodology; respondents could report up to 6 primary destinations**

# Spending

***Approximately how much money did your travel party spend during your overnight pleasure trip in Newfoundland and Labrador?***

*Non-resident respondents (n=1,651)*

**\$4,179**



**All respondents**  
(per travel party)

**\$4,932**



**Vacation**  
(per travel party)

**\$2,098**



**VFR**  
(per travel party)

- Survey respondents reported an average spending of just under \$4,200 per travel party during their trips in the province
- Survey respondents represent a total spending of \$6.9 million in the province during May to October 2022
- Average spending of respondents' travel parties who visited for vacation was \$4,932, representing a total spending of \$5.7 million while travelling in the province
- Respondents visiting relatives or friends in the province during May to October 2022 reported significantly lower spending levels at just under \$2,100 per travel party, spending a total of nearly \$611,000
- Spending levels among these two survey respondent segments differ mainly due to nights spent in paid accommodations as well as participation levels in activities and experiences

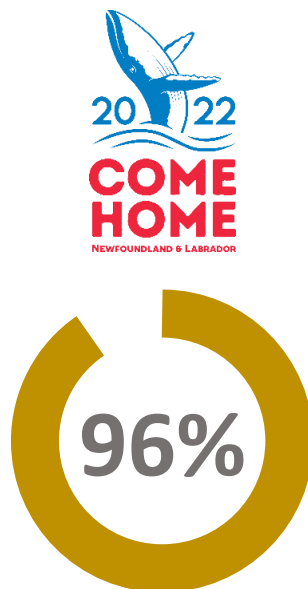


- Among nearly all survey respondents (96%), *Come Home 2022* was not viewed as a key motivator for taking a trip to NL as they would have visited regardless
- When asked to rate on a scale of 0 to 10 how important *Come Home 2022* was in their decision to take a trip here, 16% of survey respondents indicated that *Come Home 2022* played some role (rating 1-10) in their travel decision, with 6% indicating that *Come Home 2022* was somewhat important (rating 6-10)
- Despite not necessarily visiting for *Come Home 2022*, nearly 1 in 5 (16%) of survey respondents reported that they took in the festivities and participated in specific *Come Home 2022* events
- While nearly all vacation (96%) and VFR (95%) respondents would have visited the province regardless of *Come Home 2022*, VFR respondents were more likely to indicate that the celebrations were at least somewhat important (9% vs. 5%) in their travel decision and to have taken in specific events (20% vs. 16%)

# Come Home 2022

***If Come Home 2022 celebrations were not taking place in 2022, would you still have chosen to take a trip to NL?***

Non-resident respondents (n=1,672)  
% Yes



VFR 95%  
Vacation 96%

***How important was Come Home 2022 in your decision to take a trip to Newfoundland and Labrador?***

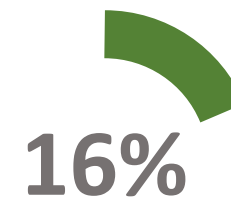
Non-resident respondents (n=1,672)  
Scale of 0-10: 0='Come Home 2022 played no role in our decision', 10='Come Home 2022 is why we decided to take a trip';  
% selecting 6-10



9%  
5%

***Did you take part in any Come Home 2022 events or festivities during your trip?***

Non-resident respondents (n=1,672)  
% Yes



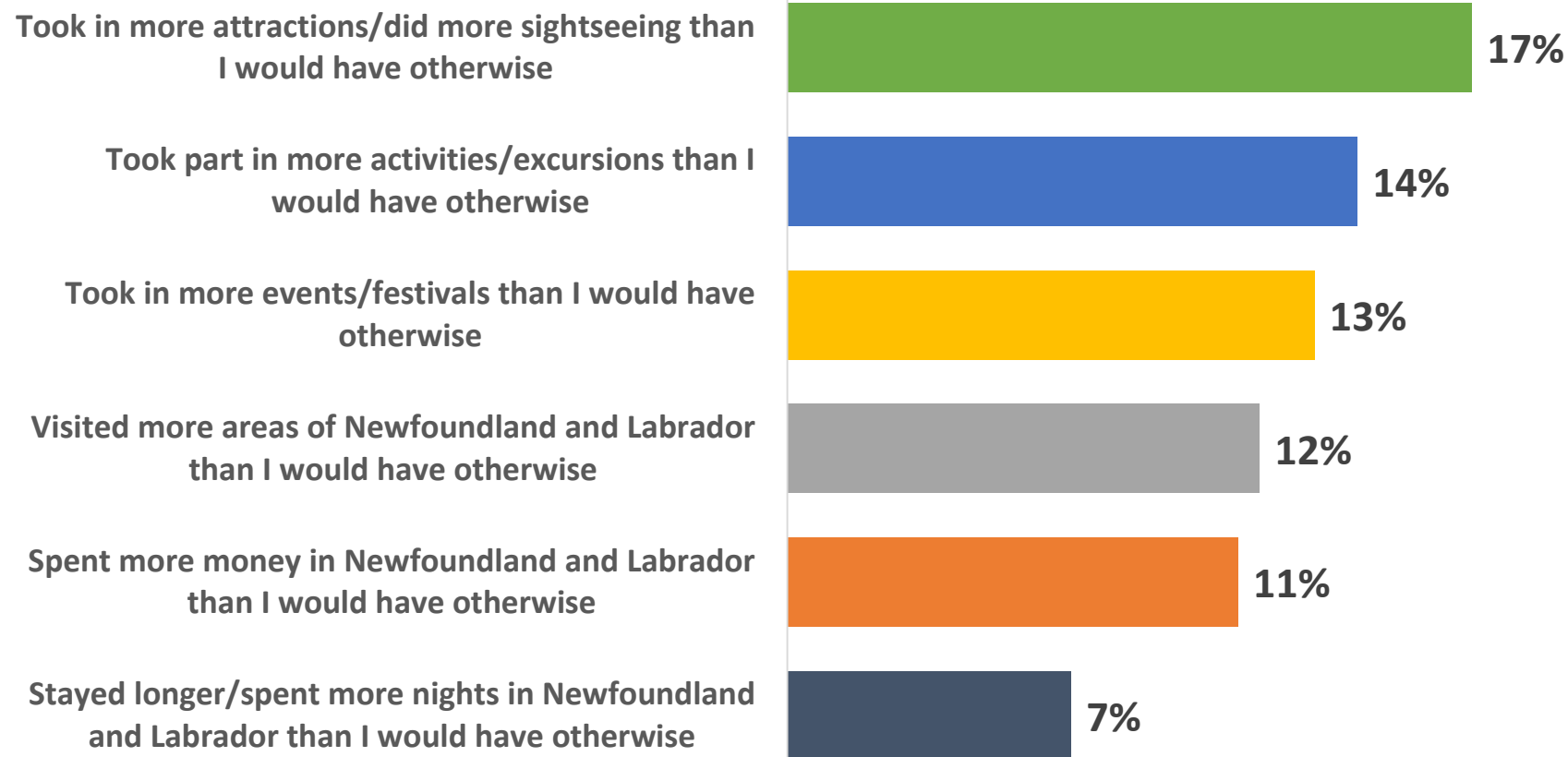
20%  
16%

VFR	95%	9%	20%
Vacation	96%	5%	16%

# Come Home 2022

## *As a result of Come Home 2022 celebrations, I ...*

*Non-resident respondents (n=1,672)*

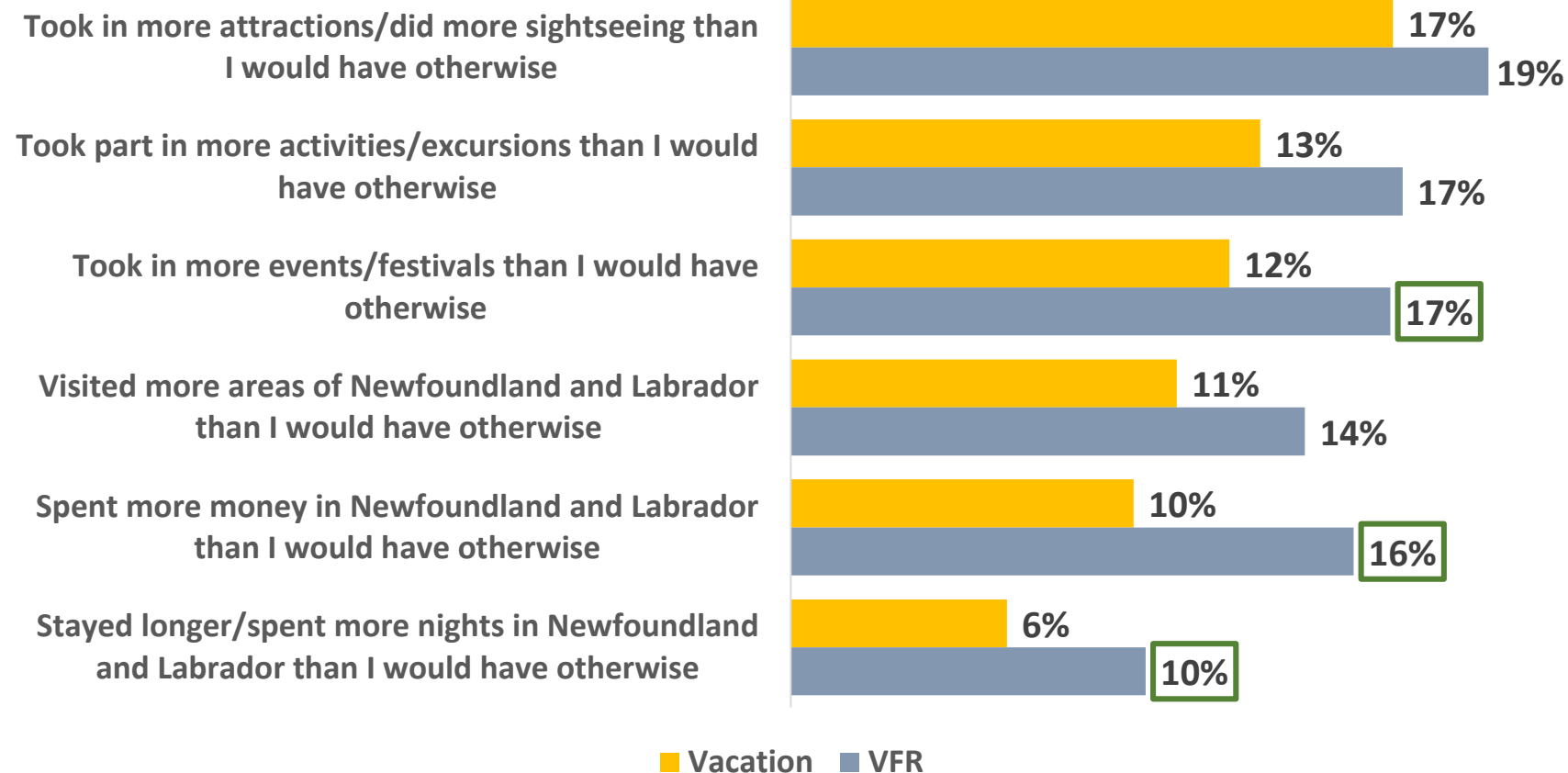


- While *Come Home 2022* was not the key motivator for their trips to NL, many survey respondents were encouraged to do more, see more, and spend more as a result of the special events and festivities than they would have otherwise
- Most notably, nearly 1 in 5 (17%) of survey respondents indicated that they took in more attractions or did more sightseeing while 14% reported taking part in more activities or excursions than they would have without *Come Home 2022*
- Also as a result of *Come Home 2022*, 1 in 10 survey respondents each visited more areas of the province and spent more money
- A small share of survey respondents (7%) was flexible enough with their travel arrangements to be able to spend more nights in the province due to the *Come Home 2022* festivities

# Come Home 2022

## As a result of Come Home 2022 celebrations, I ...

Non-resident respondents, by trip purpose: Vacation (n=1,165); VFR (n=294)



■ Vacation ■ VFR

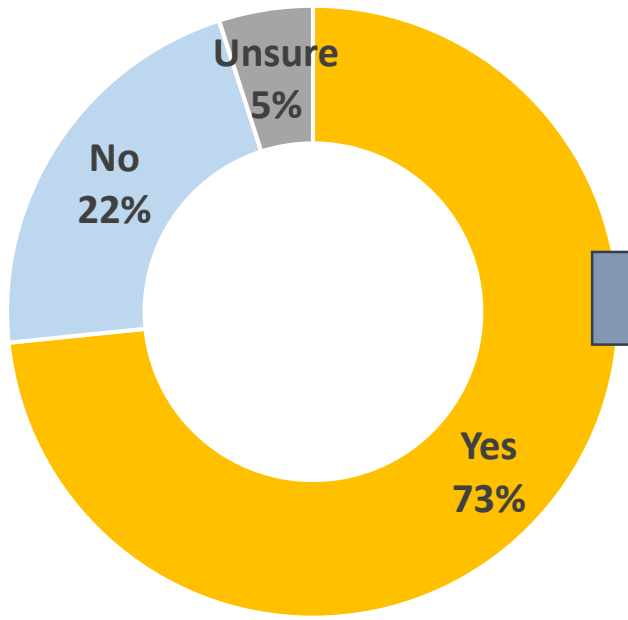
- While many trips were already planned before the *Come Home 2022* campaign launched, there are some notable differences among survey respondent segments on how the campaign resonated with them
- Not surprisingly, the campaign resonated more with survey respondents who visited friends or relatives, including those who are either originally from here but living away and those who have a connection to NL
- While VFR visitors typically spend less and are less likely to engage in activities and experiences, survey responses from this particular segment indicate that *Come Home 2022* did have a positive impact encouraging them to experience more and take in more of the province than they would have otherwise
- In particular, VFR respondents were significantly more likely than vacation respondents to take in more events (17% v. 12%), spend more money (16% v. 10%) and stay longer (10% v. 6%)

# Advertising Awareness

- Survey respondents indicated high levels of advertising recall, with 73% of respondents having seen or heard advertising for the province over the past 12 months
- High levels of advertising recall were reported by both vacation (74%) and VFR (75%) respondents
- Among those respondents who did see or hear advertising for the province over the past 12 months, the advertising was also very impactful in influencing them to take a trip to the province, with 2 in 5 respondents (39%) indicating that this was the case
- The advertising was significantly more impactful on vacation respondents, with 45% of them saying that the advertising they saw or heard in the last 12 months influenced them to take an overnight pleasure trip to NL while only 19% of VFR respondents indicated that the advertising influenced them to take this trip to NL

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

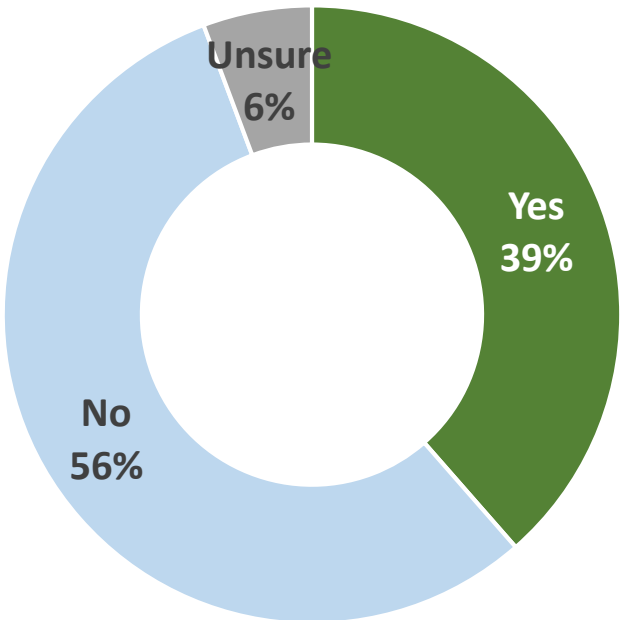
*Non-resident respondents (n=1,672)*



VFR – yes:	75%
Vacation – yes:	74%

*Did the advertising you saw or heard influence you to take an overnight pleasure trip to Newfoundland and Labrador in 2022?*

*Non-resident respondents who have seen or heard advertising (n=1,227)*

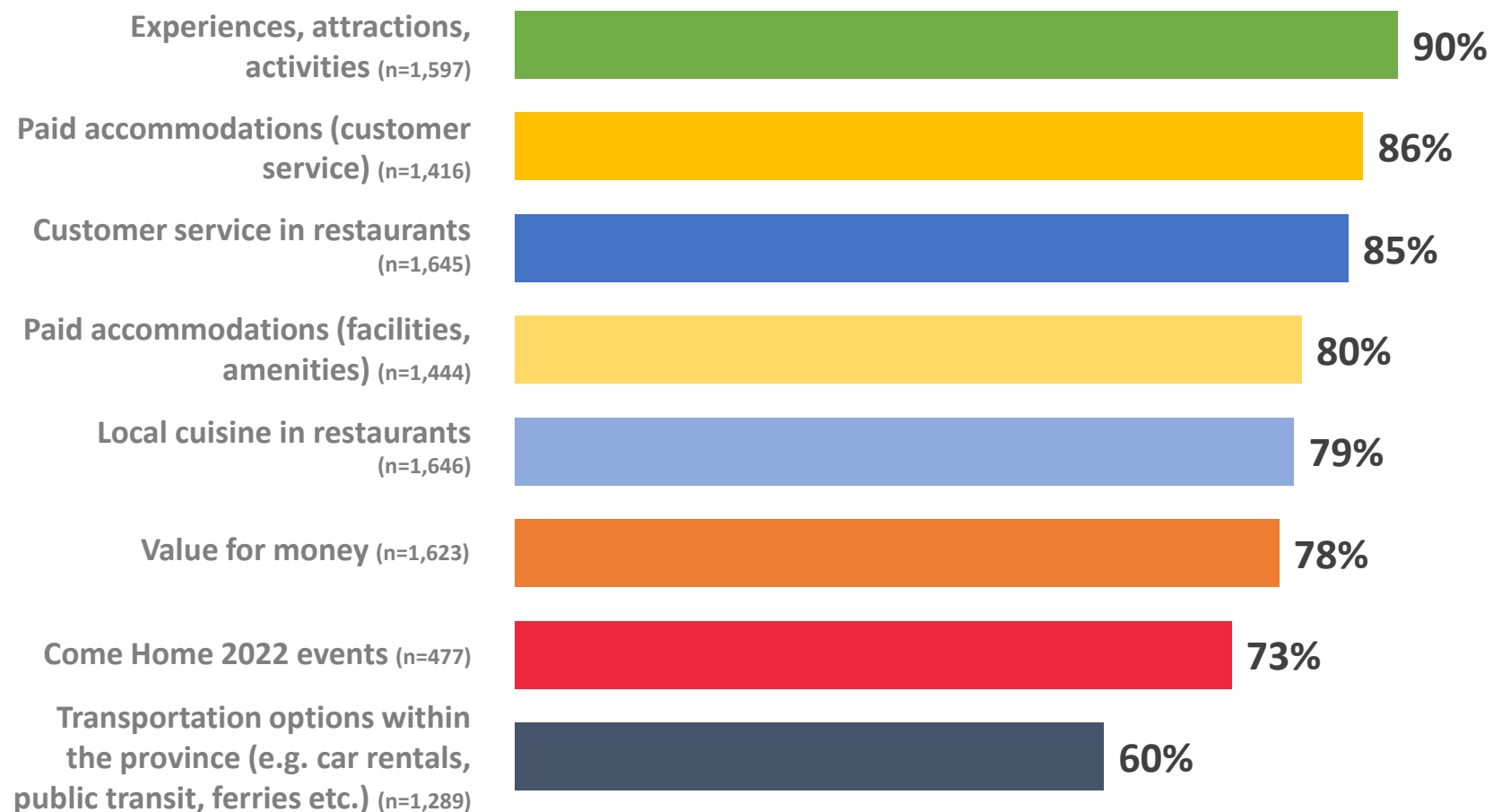


VFR – yes:	19%
Vacation – yes:	45%

# Visitor Satisfaction

***How would you rate your level of satisfaction with the following aspects of your trip in Newfoundland and Labrador?***

***Non-resident respondents; scale of 1-10, 10=completely satisfied; % selecting 8 to 10***

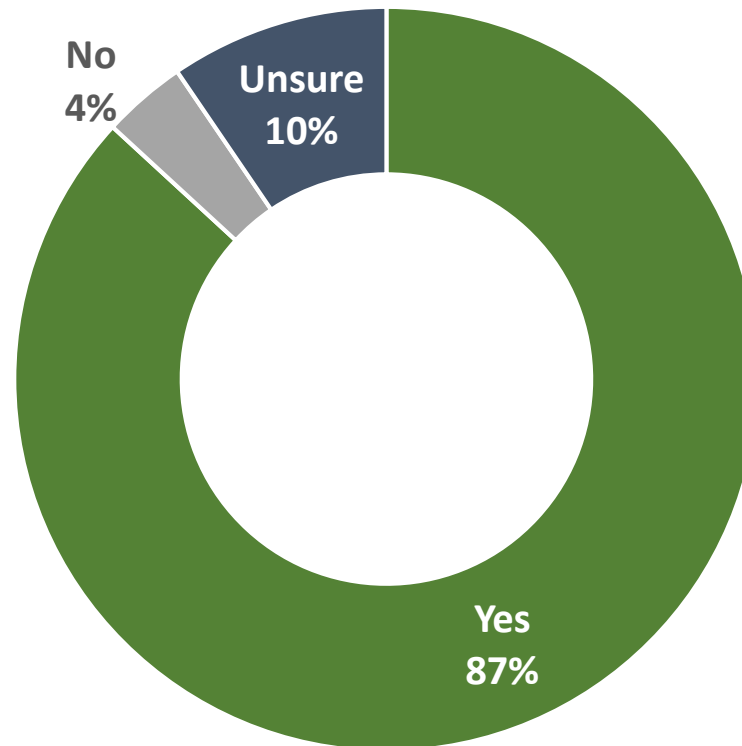


- Survey respondents who visited the province during the May to October 2022 period reported high satisfaction levels with most aspects of their trip
- At 90%, survey respondents were particularly satisfied with their experiences, activities and attractions they visited while nearly as many were highly satisfied with the customer service in paid accommodations (86%) and in restaurants (85%)
- Satisfaction levels were somewhat lower with facilities and amenities in paid accommodations (80%) and local cuisine in restaurants (79%)
- Among those respondents who took in *Come Home 2022* events, 73% were highly satisfied while only 60% were satisfied with intra-provincial transportation options, including car rentals, public transit and ferries
- Overall, 4 in 5 respondents (78%) were satisfied with the value for money they received during their trip in the province

# Future Travel

***Based on your experience travelling on an overnight pleasure trip in NL in 2022, would you consider taking another overnight pleasure trip in Newfoundland and Labrador in the future?***

*Non-resident respondents (n = 1,672)*



## **BUT ...**

... Respondents did identify issues impacting their trip experiences which would make them rule out or reconsider a future trip to the province



**Rental vehicle availability**



**Public transit options**



**Road conditions/maintenance**



**High costs/prices**

- Based on their trip experiences during the peak season 2022, nearly 9 in 10 survey respondents (87%) indicated that they would consider taking another trip to NL in the future, with 10% remaining unsure about it at this stage
- Not surprisingly, the share of VFR respondents who indicated that they would return for another visit is significantly higher at 95% than the share of vacation respondents who would do so (84%)
- Survey respondents also provided insights into issues they experienced during their trip that would prevent them from making another visit to the province in the future
- Most notably, survey respondents indicated that issues with rental vehicle availability, a lack of public transit options and the state of the roads in the province would keep them from returning, with high costs/prices also being cited as a deterrent for future trips to the province