

Newfoundland and Labrador Resident Tourism and Travel Sentiment

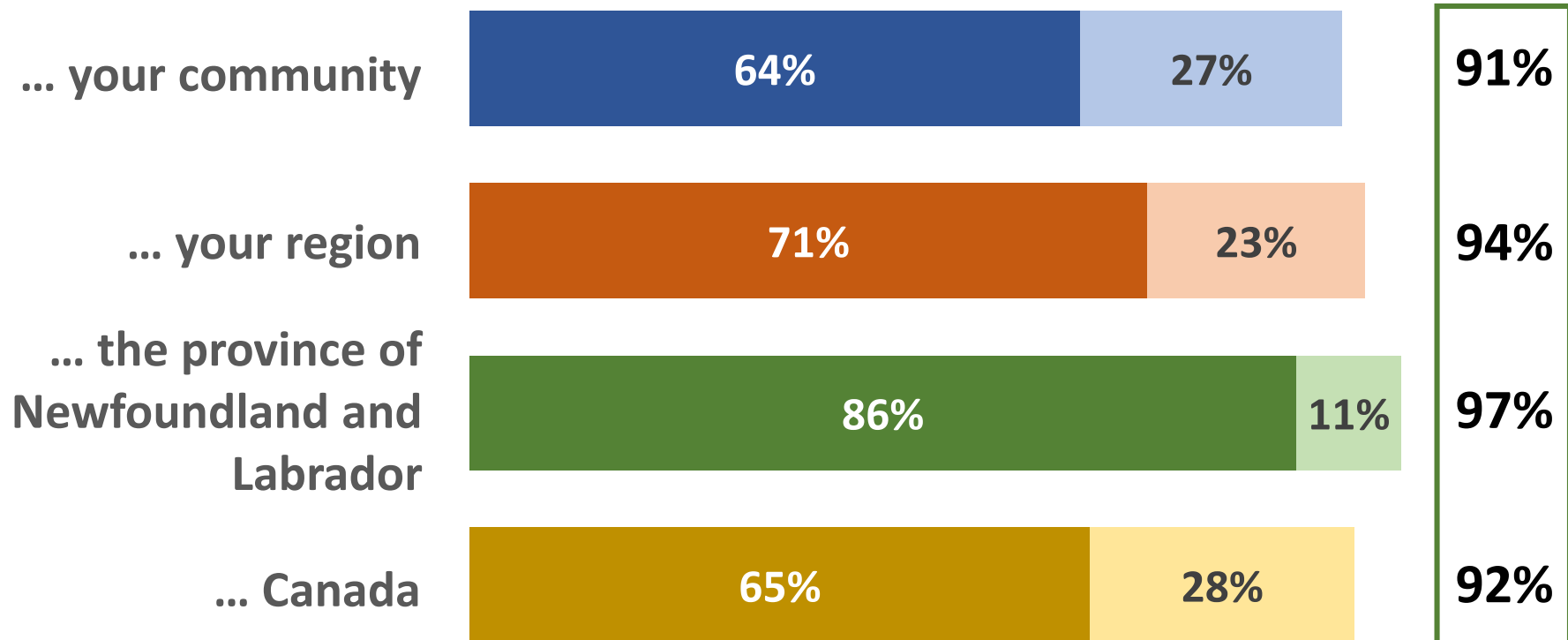
April 2023

Residents' Perception of Tourism and Visitors

How do residents feel about tourism?

In your opinion, how important is the tourism industry to the economic well-being of ...

% Very/Somewhat important



Source: TCAR April 2023

- Overall, residents are strongly receptive to the notion that tourism is important to economic well-being
- Residents feel unanimously (97%) that tourism is an economic driver for the province, with nearly 9 in 10 (86%) saying that tourism is very important to the economic well-being of the province
- This strong sentiment is consistent across all regions and all age groups
- Considering the economic diversity of the province from a community perspective, fewer residents feel that tourism is very important when it comes to their own community but they do have a strong sense of the sector's overall benefits
- From a regional perspective, tourism is also widely recognized as bringing economic benefits
- Residents also strongly believe that tourism is important to the economic well-being of Canada

How do residents feel about tourism?

In your opinion, how important is the tourism industry to the economic well-being of ...

Trending: % Very/Somewhat important

... your community



... your region



... the province of NL



... Canada

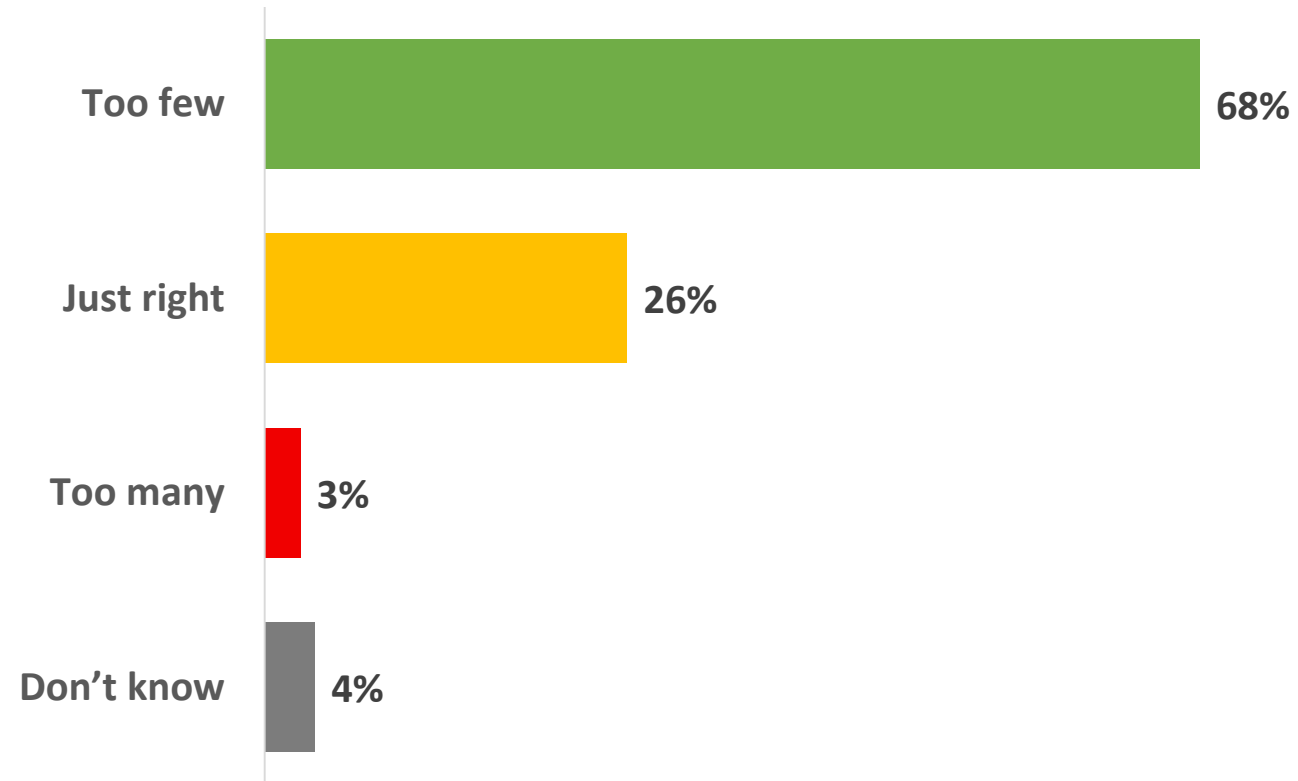


Feb-21 Jun-21 Feb-22 Mar-22 May-22 Aug-22 Feb-23 Apr-23

Source: TCAR April 2023

How do residents feel about tourism?

Do you think Newfoundland and Labrador has too few, too many, or just the right amount of visitors?

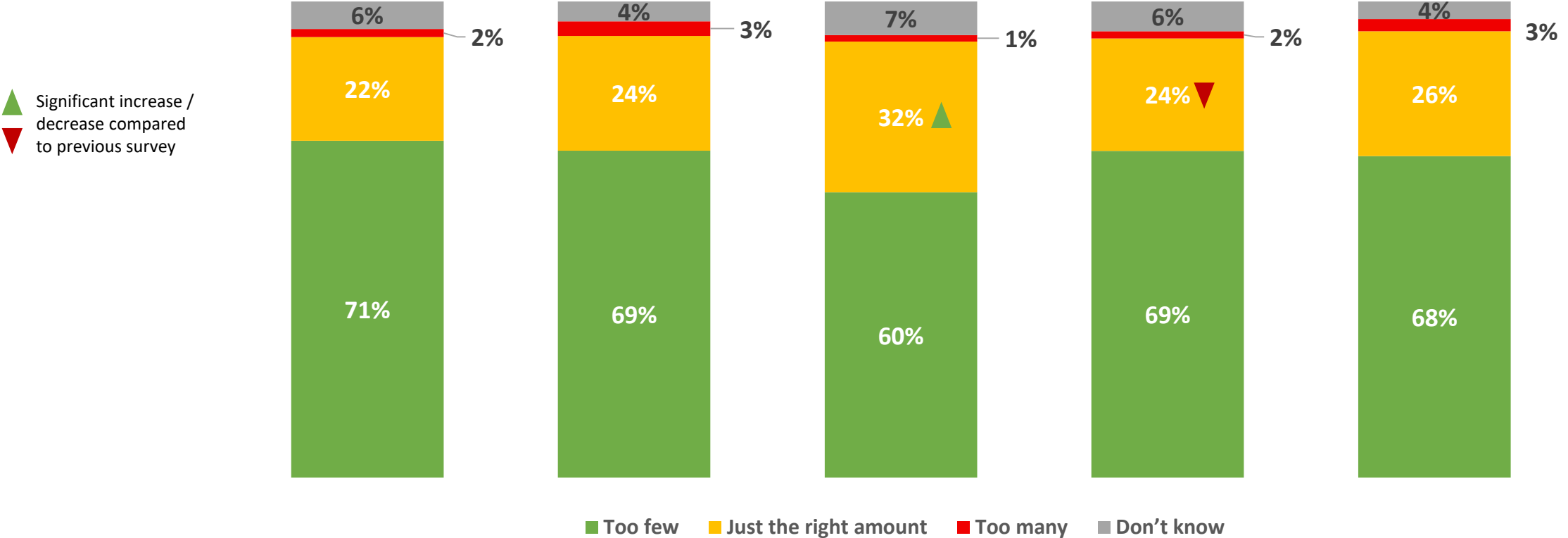


Source: TCAR April 2023

- The majority of NL residents feel that there is room for growth in visitor numbers, with 68% of residents thinking that the province has too few visitors
- While a quarter of residents (26%) think that the number of visitors to the province is just right, only 3% perceive the number of visitors as too many
- While NL residents' perceptions of visitor numbers to the province are consistent across all regions, those residents aged 55 or older are significantly more likely to think that the province has too few visitors (72%) than those residents aged 18 to 34 (58%)

How do residents feel about tourism?

Do you think Newfoundland and Labrador has too few, too many, or just the right amount of visitors? – Trending



Source: TCAR April 2023

How do residents feel about tourism?

Which of the following statements best describes your overall perception of the level of tourism in Newfoundland and Labrador?

NL is well equipped to handle an increase in the number of visitors



NL is well equipped to handle the current number of visitors



The current number of visitors is putting too much pressure on NL's society, infrastructure and/or environment

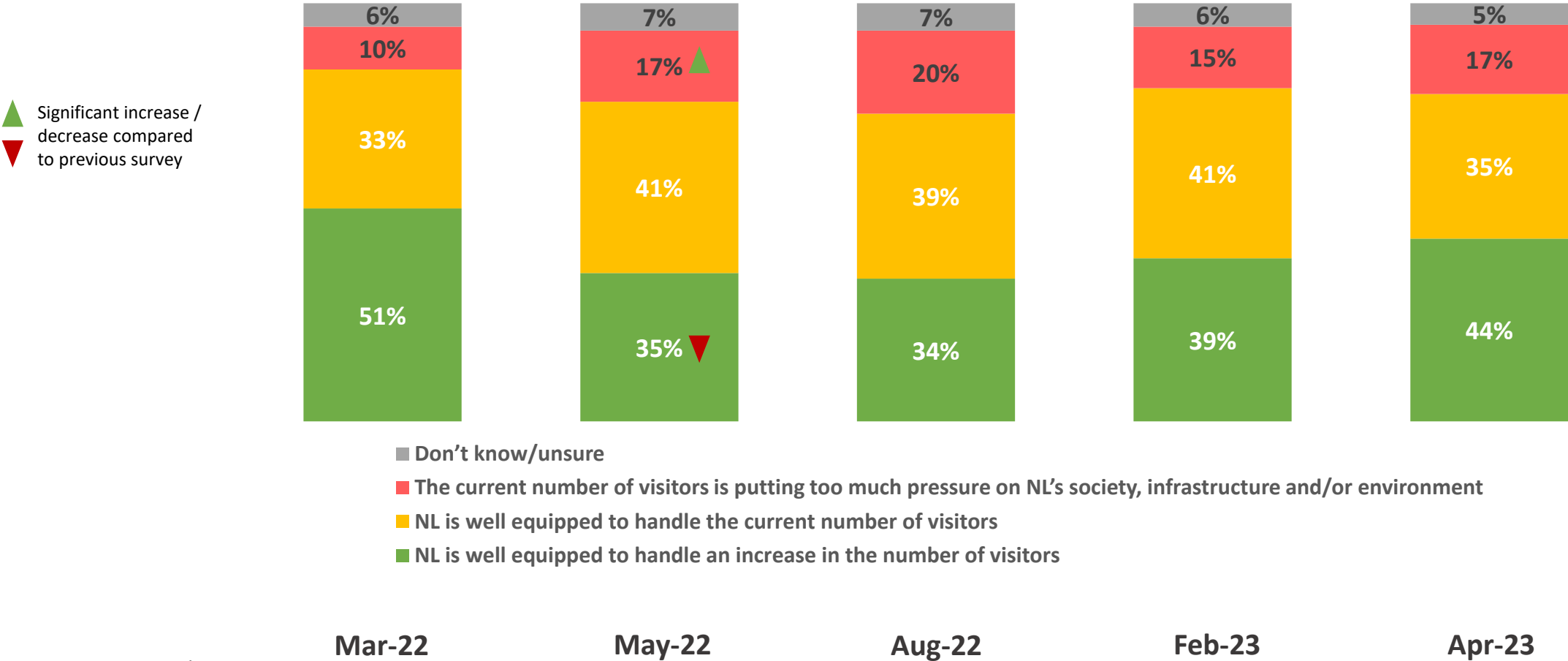


Source: TCAR April 2023

- Overall, NL residents believe that there is some room for growth in the number of visitors, with more than two in five residents (44%) perceiving the province to be well equipped to handle an increase in visitors while not quite as many residents (35%) feel that the province can handle the current level of visitation
- However, 17% of residents feel that the current number of visitors is putting too much pressure on the province's society, infrastructure and/or environment
- This sentiment is similar among residents across all regions and all age groups

How do residents feel about tourism?

Which of the following statements best describes your overall perception of the level of tourism in Newfoundland and Labrador? – Trending

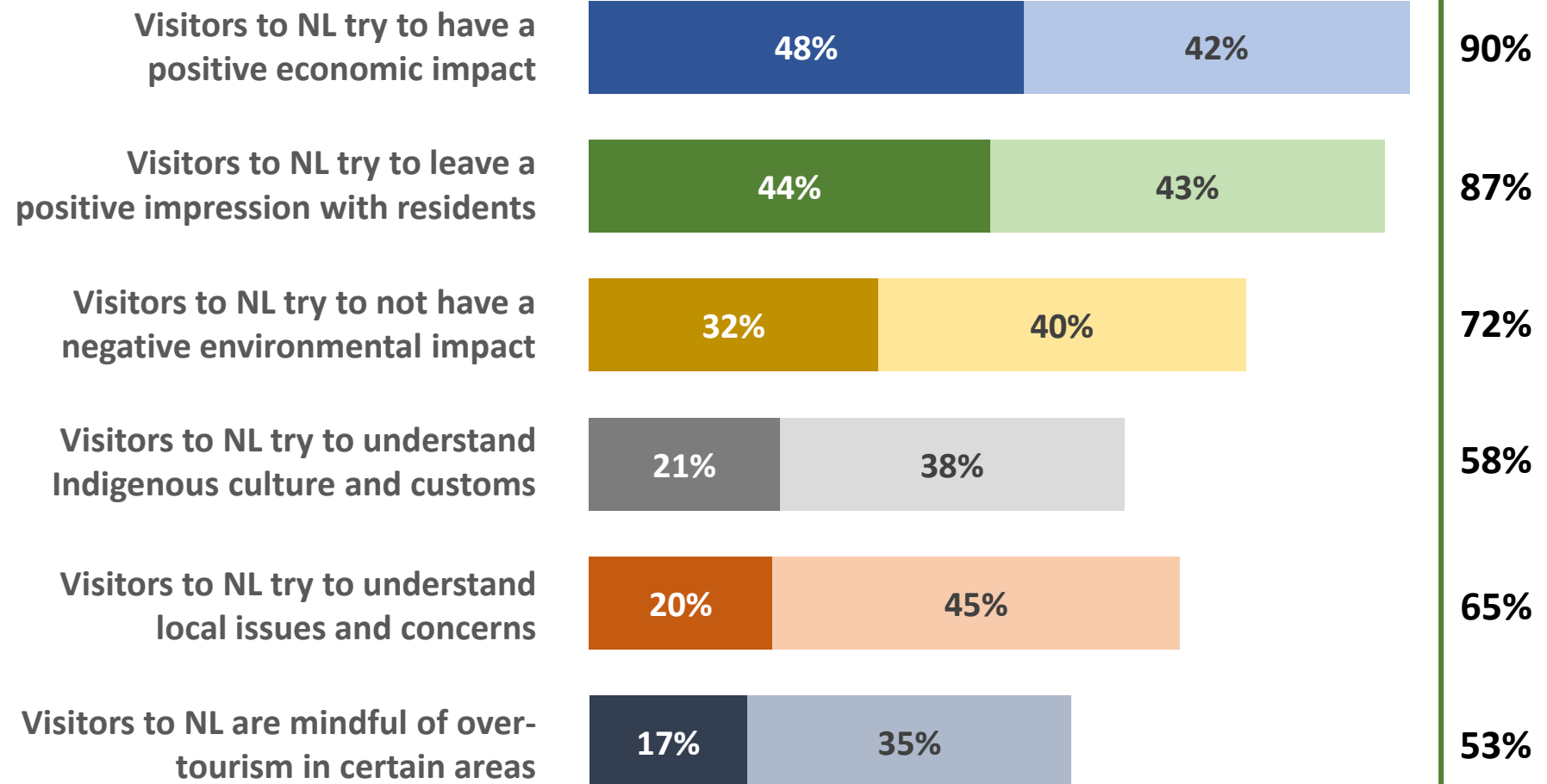


Source: TCAR April 2023

How are visitors perceived?

To what extent do you agree or disagree with each of the following statements?

% Strongly/Somewhat agree



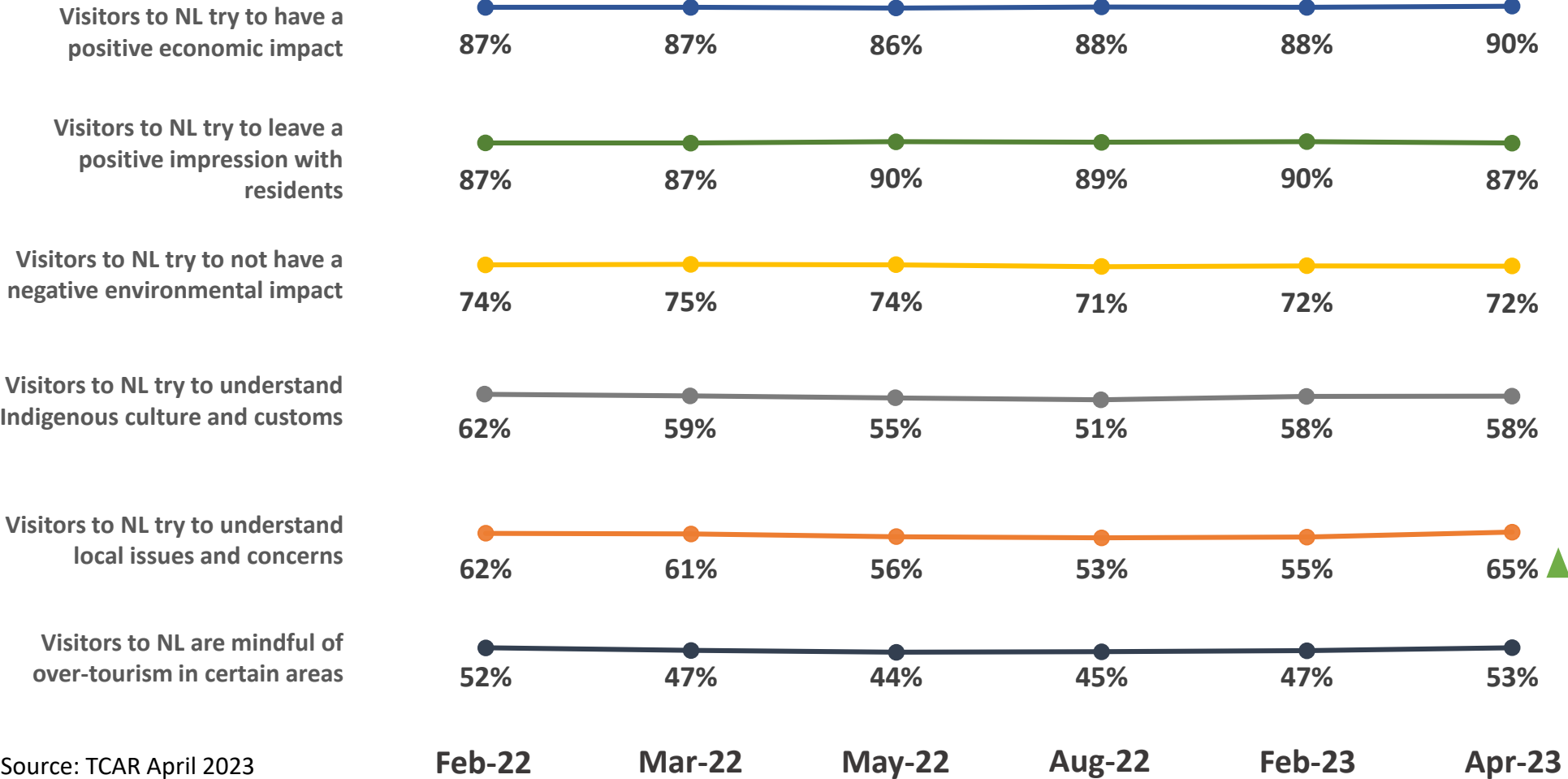
Source: TCAR April 2022

- The pre-pandemic global success of tourism has led to concerns about its unbalanced growth in some areas and the impact on local communities and the environment, increasing the focus on tourism's collective social responsibility
- Balancing tourism growth with sustainable community benefits to create great places to visit and to live requires an understanding of local residents' perceptions of tourism as well as their concerns
- The vast majority of NL residents recognize the positive economic impact of visitors. A majority agree that visitors do make an effort to understand local issues as well as Indigenous culture/customs
- While nearly three quarters of residents (72%) perceive visitors as environmentally conscientious when travelling here, only just over half (53%) agree that visitors are mindful of over-tourism

How are visitors perceived?

To what extent do you agree or disagree with each of the following statements?

Trending: % Strongly/Somewhat agree

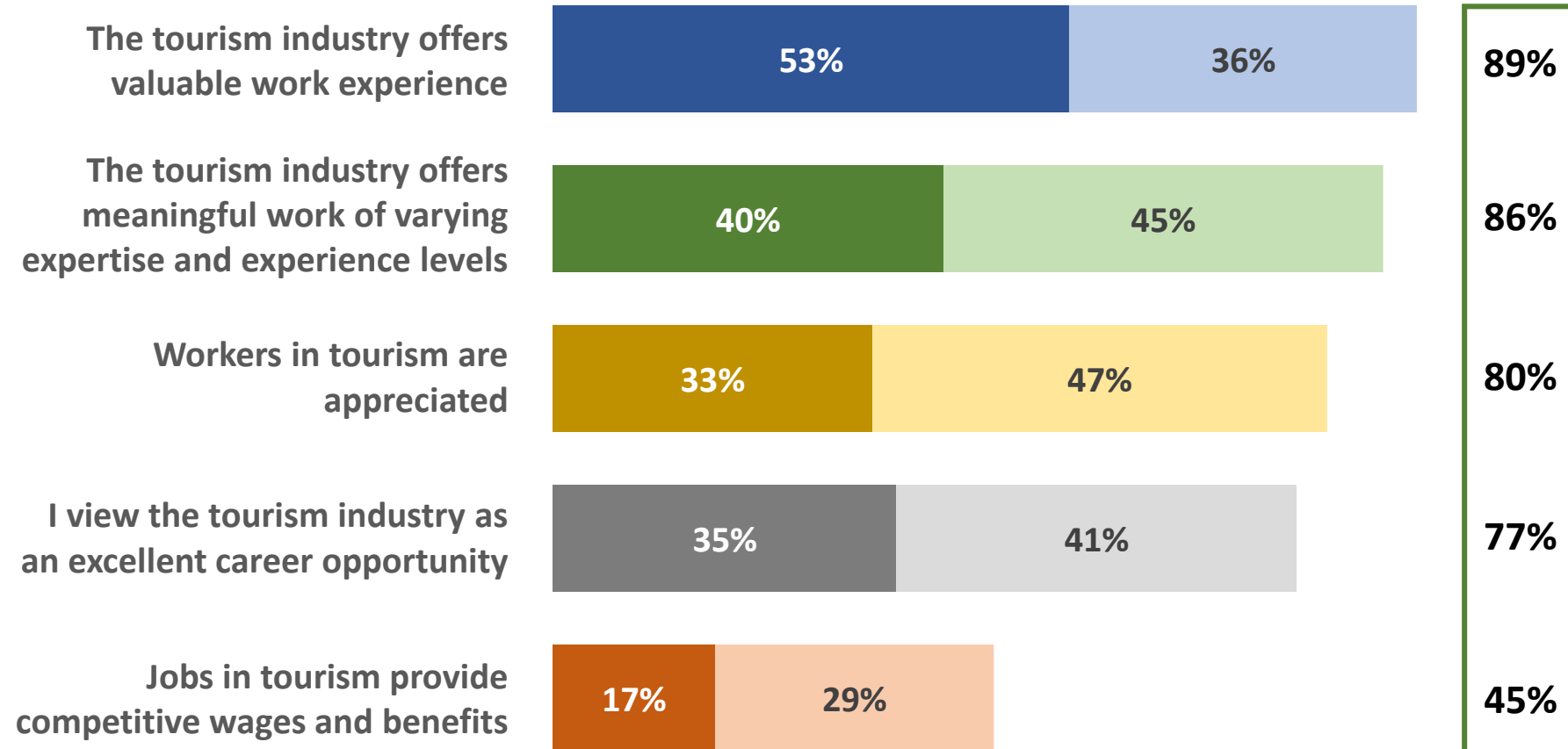


Source: TCAR April 2023

How are jobs in tourism perceived?

To what extent do you agree or disagree with each of the following statements?

% Strongly/Somewhat agree



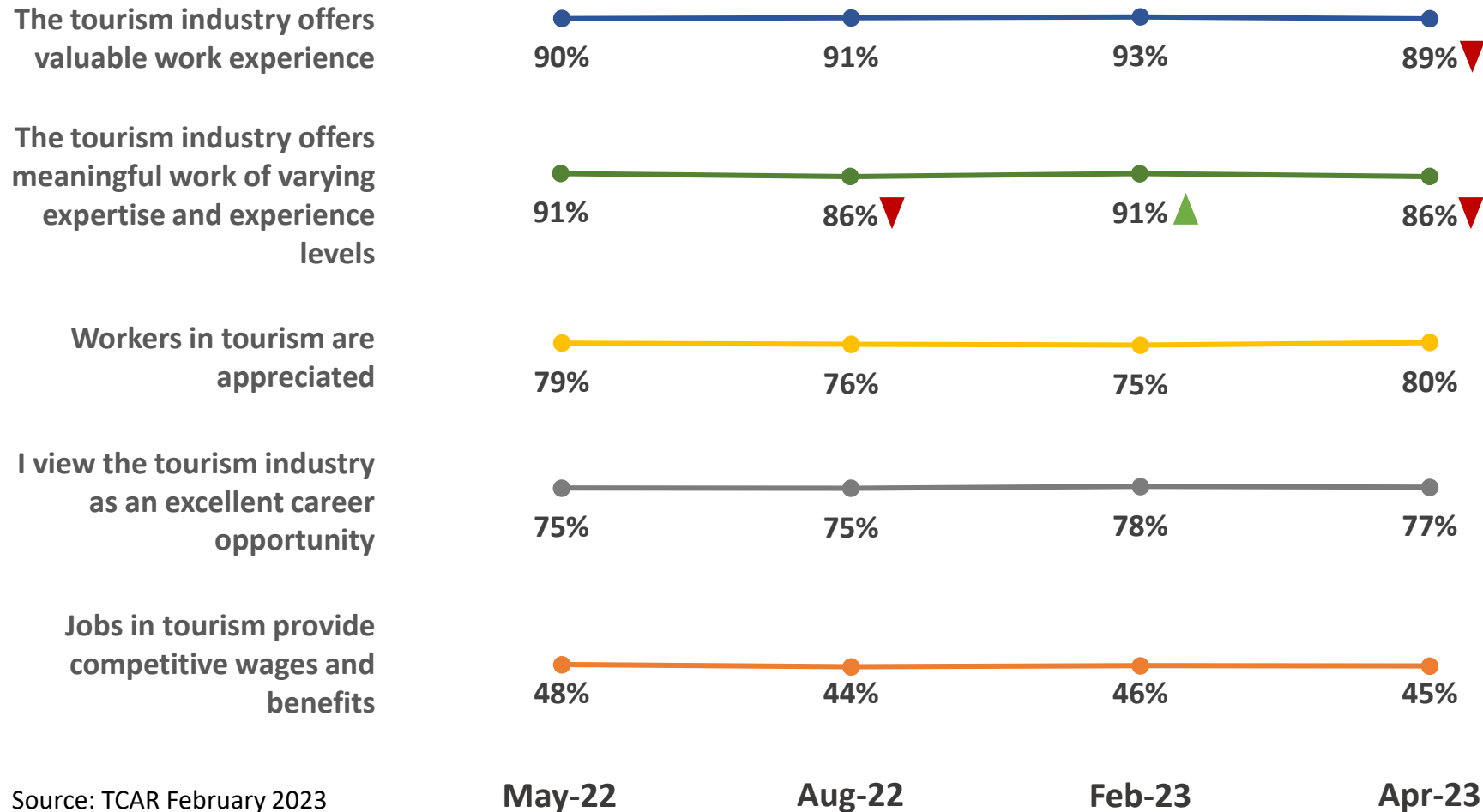
Source: TCAR April 2023

- Quality and excellence of service are key contributors to positive visitor experiences. As tourism recovers from the COVID-19 pandemic, the sector is facing a shortage of labour and trained staff
- Sentiment towards tourism as a place of work, in particular post-pandemic, plays a vital role in the sector's ability to attract and retain staff. Not surprisingly, residents' sentiment varies across issues
- The vast majority of residents agree that tourism offers valuable work experiences (89%) and meaningful work requiring varying levels of expertise and experience (86%)
- While four in five residents agree that workers in tourism are appreciated (80%) and view the industry as an excellent career opportunity (77%), only about one third strongly agree that this is the case. Only 45% agree that wages and benefits are competitive

How are jobs in tourism perceived?

To what extent do you agree or disagree with each of the following statements?

Trending: % Strongly/Somewhat agree

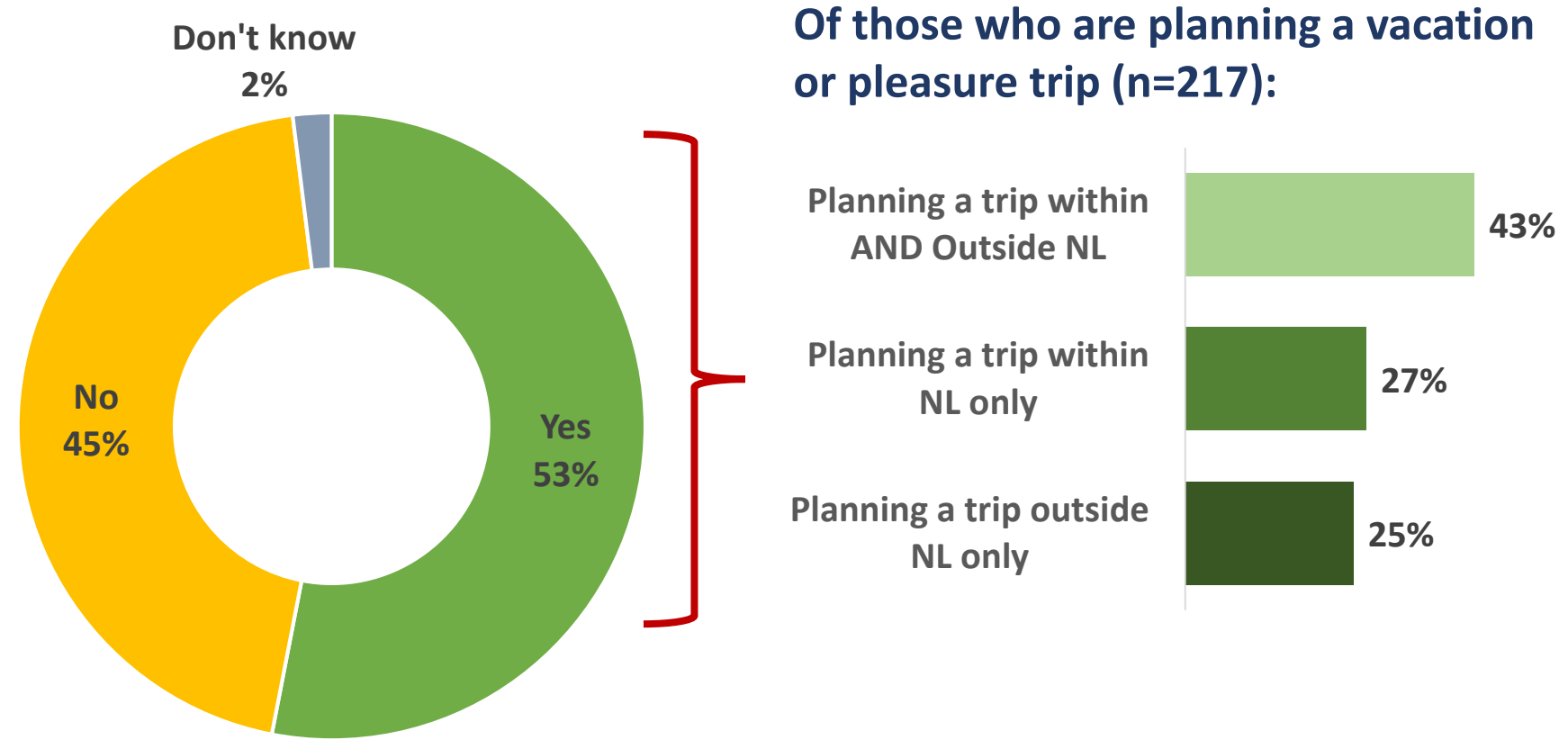


Resident Travel Intentions

Will residents travel in 2023?

Are you planning a vacation or pleasure trip between May and December 2023?

- Travel intentions among residents are similar to last year, with 53% indicating that they are planning a vacation or pleasure trip between May and December 2023
- Among those residents who do intend to take a trip, the largest share – over two in five (43%) – are planning to take a trip both within and outside the province
- One quarter of residents with travel plans intend to take a trip outside the province only (25%) while a similar share (27%) plan to travel within the province only
- Residents aged 35 to 54 (62%) are significantly more likely to be planning a trip this year than those aged 18 to 34 (45%)
- Among those residents who do plan a trip, those aged 18 to 34 are the most likely to travel both within and outside the province while those aged 55 or older are the most likely to travel outside the province only

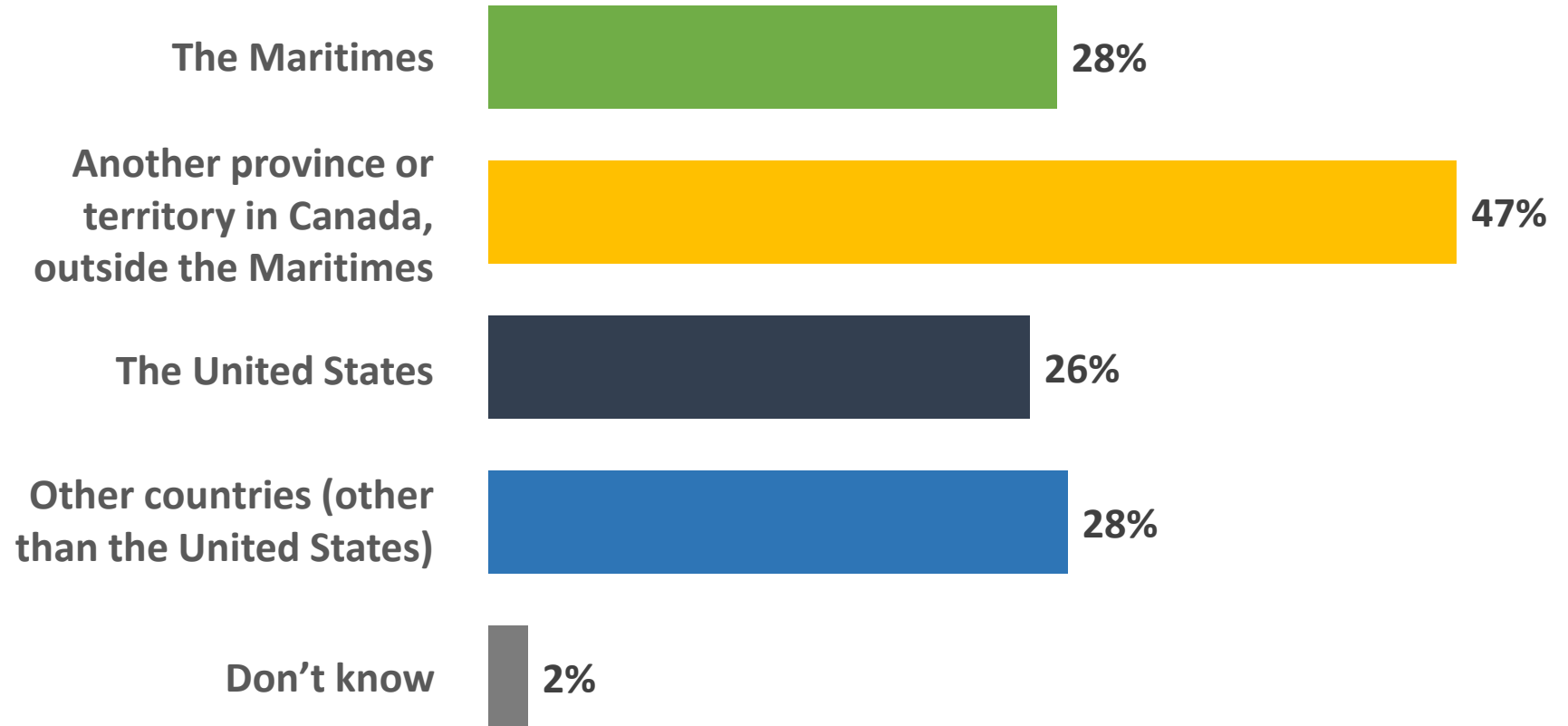


Source: TCAR April 2023

Where would residents travel?

Where outside Newfoundland and Labrador are you planning to take a vacation or pleasure trip?

Residents who are planning a vacation or pleasure trip outside NL in 2023 (n=152)



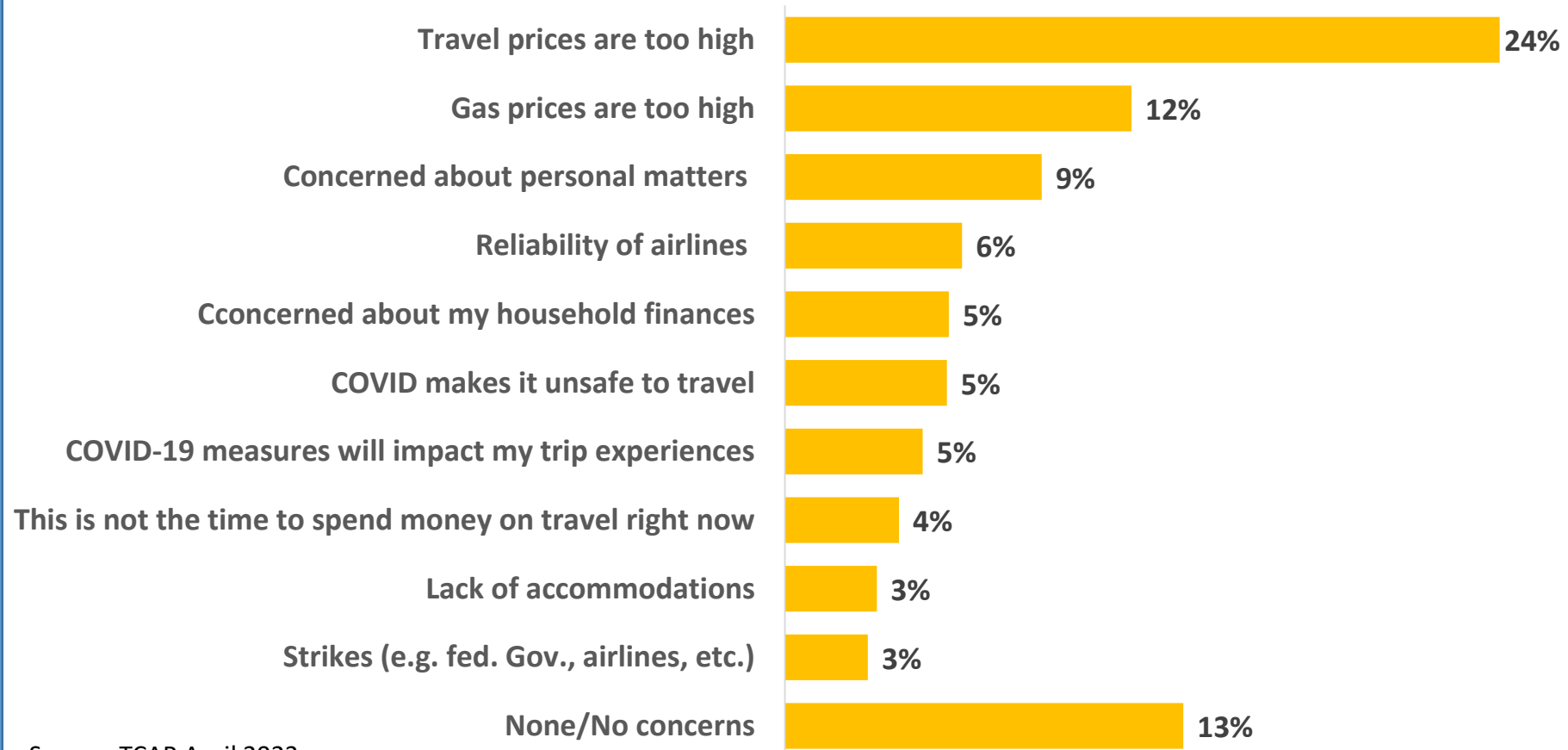
Source: TCAR April 2023

- At 47%, residents who are planning a trip outside Newfoundland and Labrador are most likely to travel to another province or territory in Canada (outside the Maritimes)
- One quarter of residents with out-of-province travel plans for 2023 are planning to visit the US (26%) while a slightly higher share would visit the Maritimes (28%) and other countries (28%)
- Generally, out-of-province travel plans are similar among residents of all age groups; however, at 48%, residents aged 18 to 34 are significantly more likely to be planning a trip to other countries (other than the US) than residents of all other age groups (35-54: 20%; 55+: 25%)

Travel concerns

What is your biggest concern right now that would prevent you from taking the vacation or pleasure trip(s) you are planning in 2023?

***Residents who are planning a vacation or pleasure trip between May and December 2023
(Single choice response, n=217)***



Source: TCAR April 2023

- Residents with travel plans have a variety of concerns that would prevent them from taking their planned trips in 2023, however, cost/financial concerns dominate, worrying nearly half of residents
- Their biggest concern by far are travel prices that are too high, with one quarter of residents indicating that this would prevent them from taking their trip
- Another 12% and 5% of residents respectively are concerned about high gas prices and their household finances while 4% feel that this is not the time to spend on travel
- While 10% of residents are still concerned about the impact of COVID-19 on their travel plans, nearly as many (9%) are concerned about travel interruptions due to unreliable airlines or strikes
- A similar share (9%) have concerns about personal matters such as health or family issues