

Newfoundland and Labrador Resident Travel Survey

February 2022

Background and Survey Methodology

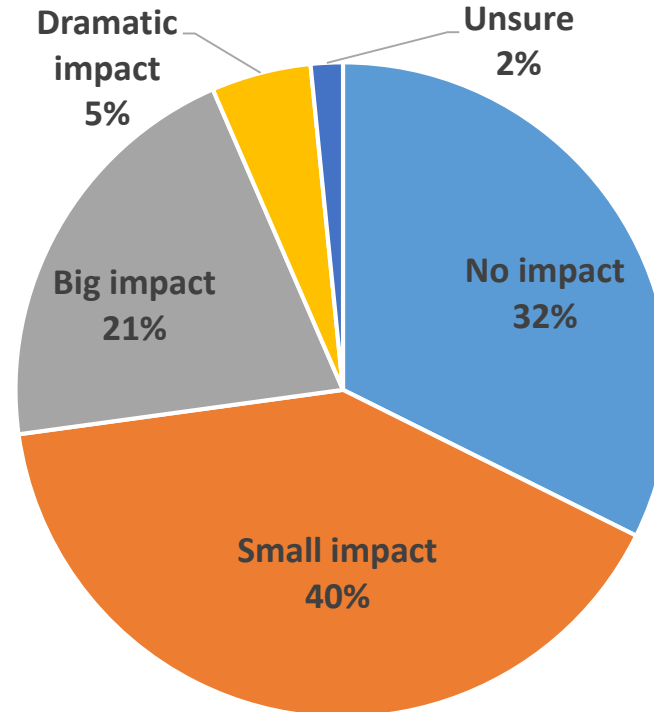
- **As in 2020, resident travel continued to be the main driver of tourism activity in the province in 2021 as restrictions for non-essential travel to the province from the rest of Canada remained in place for the first half of the year. Non-essential travel to the province from Canada resumed on July 1, 2021, with most restrictions lifted for vaccinated travellers. Travel from the US and from abroad did not resume until August and September 2021 respectively**
- **To evaluate in-province peak season (May to October) 2021 resident travel and inform marketing campaigns and experience development, Newfoundland and Labrador Tourism conducted a survey with NL residents on their past season travel and upcoming travel intentions in the next 12 months (November 2021 to October 2022)**
- **The NL resident survey was conducted November 5 to 30, 2021; the sample included 530 NL residents age 18 or older. Survey results were weighted by age, gender and region of residence and are representative of the province's adult population (age 18 and older)**

- Generally, pleasure travel is dependent on available discretionary household funds which have been impacted to varying degrees since the start of the COVID-19 pandemic in 2020
- Nearly three quarters of NL residents (73%) reported that the pandemic has had no or only a small impact on their personal/household finances
- However, the impact does vary by age, with nearly 35% of younger NL residents (age 18-34) reporting a big/dramatic impact while the same is true for only 16% of those aged 55 and older
- It is notable that nearly 1 in 10 residents aged 35-54 reported a dramatic impact of the pandemic on their household finances, the highest share among all age groups

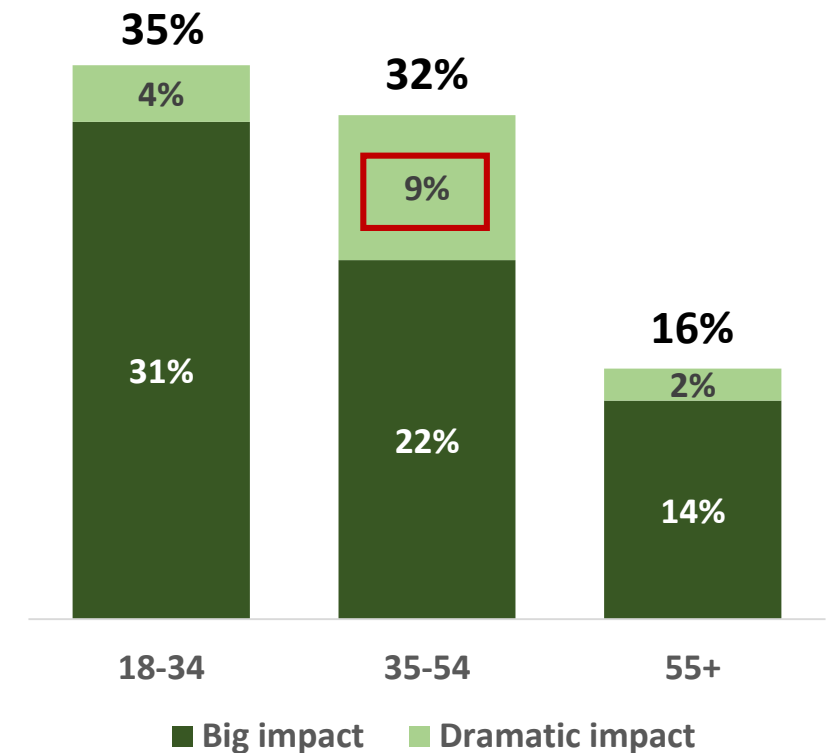
Financial Impact of COVID-19

How has the Coronavirus/COVID-19 pandemic impacted your personal/household finances?

All residents (n=530)



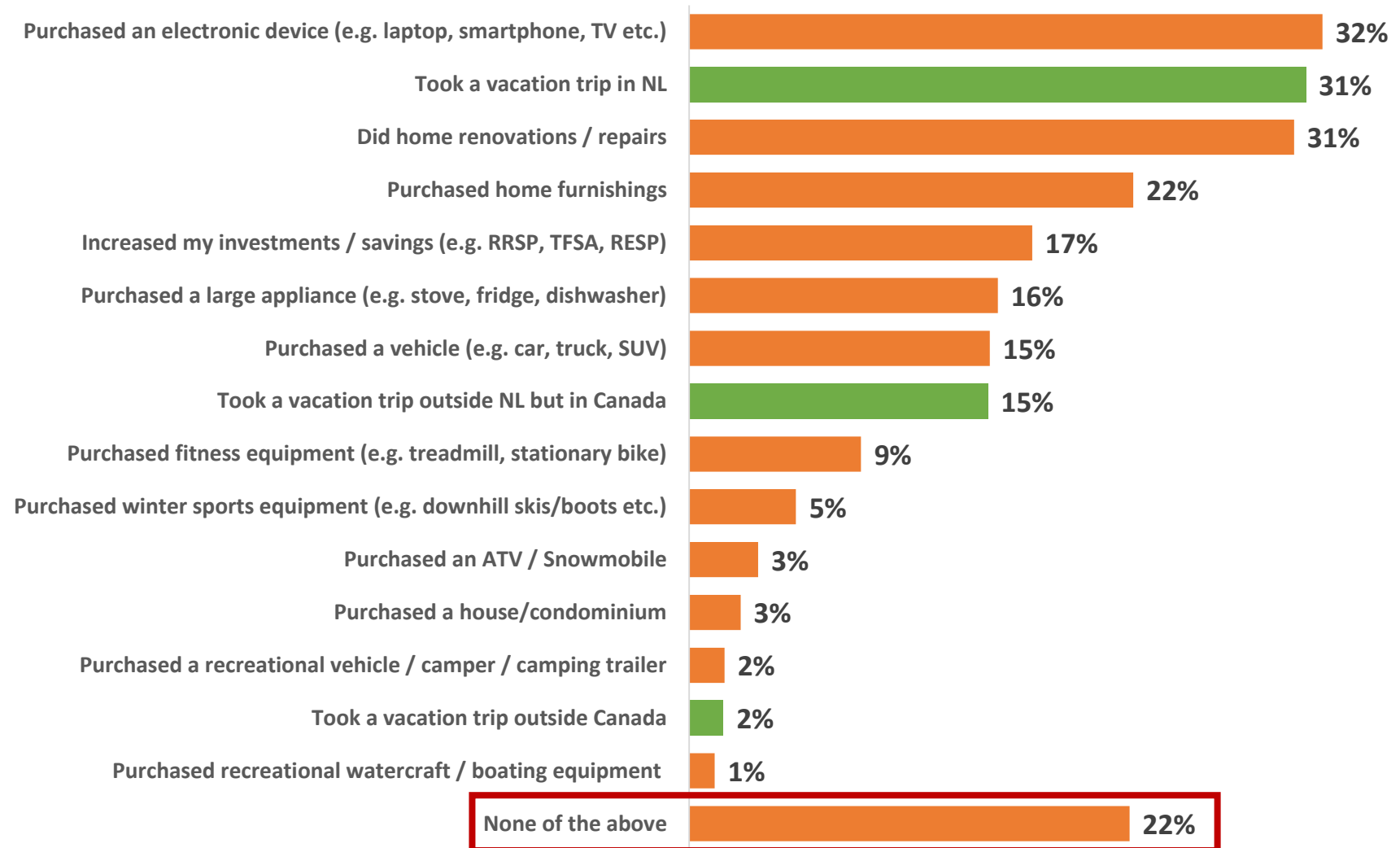
Big/dramatic impact of COVID-19 pandemic on personal/household finances, by age



Financial Impact of COVID-19

Have you done any of the following in 2021?

All residents (n=530)



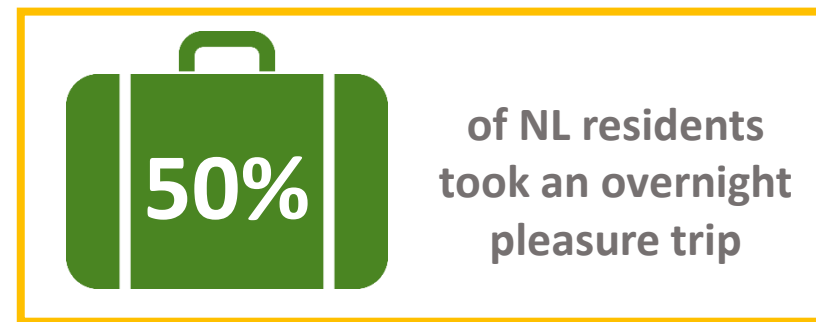
- In terms of big purchases residents made in 2021, electronic devices, in-province vacations and home renovations received top mentions
- About one quarter of residents purchased home furnishings while nearly 1 in 5 residents (17%) increased their investments and savings, up from 8% in 2020
- 22% of residents did not make any of these purchases, with older residents aged 55+ the most likely not making any of these purchases (25%). This compares to just 16% among those aged 18-34
- At 31%, residents were twice as likely to have vacationed in their home province than taking an out of province trip in Canada (15%). Only 2% of residents reported that they took a vacation trip outside of Canada

- During the May to October 2021 period, half of NL residents took an overnight pleasure trip
- As in 2020, residents mostly travelled in-province, with nearly half of them (46%) doing so
- Only 16% of residents travelled outside the province to other destinations in Canada, including 10% who travelled to the Maritimes. NS was by far the top destination residents visited outside their own province, followed by NB and ON
- At 3%, only a very small share of NL residents travelled outside of Canada, with Florida being the top destination by far, with some residents also travelling to the Caribbean and California

Summer and Fall Travel

Did you take an overnight pleasure trip between May and October 2021?

All residents (n=530)



In-province

46%



In Canada (outside NL)

16%



Other destinations
(outside Canada)

3%

Summer and Fall Travel

Did you take an overnight pleasure trip between May and October 2021?

By Age

	All residents	18-34	35-54	55+
Sample size	530	64	176	286
Overnight trip	50%	48%	55%	47%
Overnight trip in NL	46%	46%	50%	43%
Overnight trip in Canada	16%	19%	13%	16%
Overnight trip outside Canada	3%	6%	4%	1%

By Region of Residence

	All residents	St. John's	Other Eastern	Central	Western/ Labrador
Sample size	530	236	109	87	96
Overnight trip	50%	49%	50%	53%	49%
Overnight trip in NL	46%	44%	48%	52%	43%
Overnight trip in Canada	16%	16%	12%	17%	20%
Overnight trip outside Canada	3%	3%	1%	6%	3%

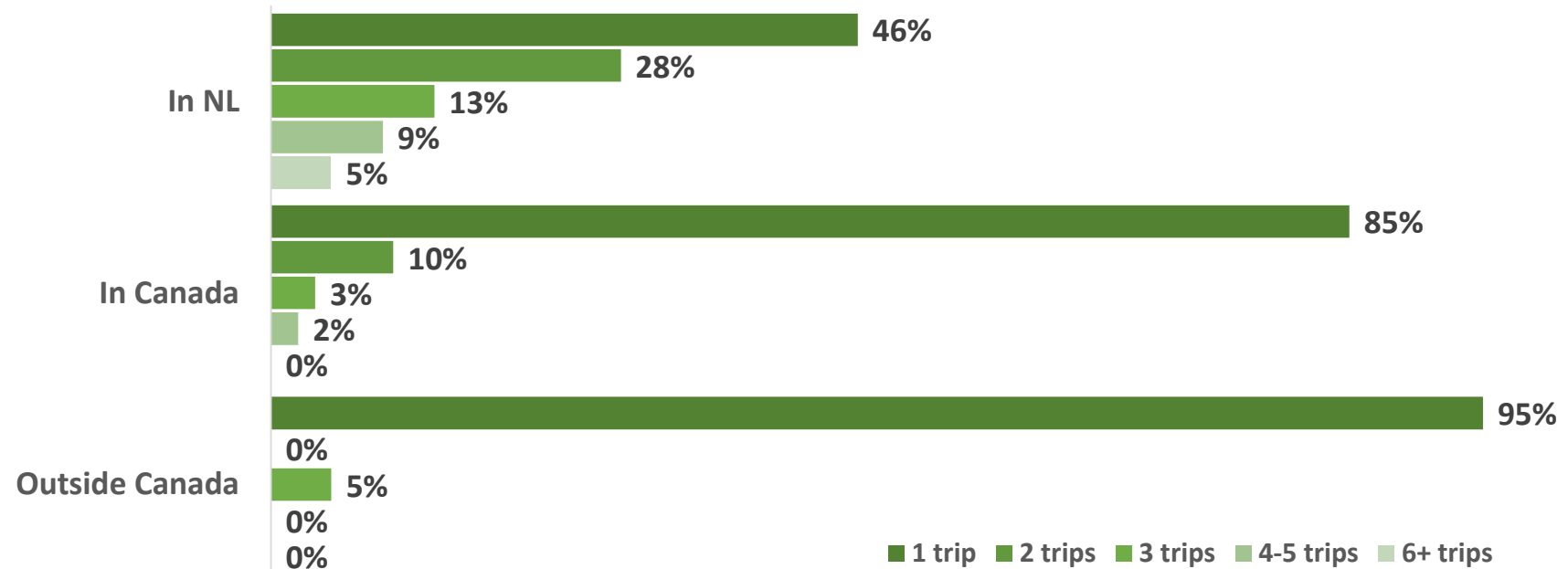
- Travel incidence and rates of travel within the province, travel outside the province in Canada and to other destinations outside Canada were similar across all age groups
- Residents aged 18-34 were more likely to take an overnight trip to other destinations in Canada as well as outside Canada
- Residents of all regions were equally likely to take an overnight trip, however, residents of the Eastern region were less likely than residents of other regions to take an out of province trip in Canada and outside Canada
- Residents of the Central region were slightly more likely to take an overnight trip in the province as well as outside Canada than residents of other regions

Summer and Fall Travel

Overnight pleasure trips taken between May and October 2021

By Destination (In NL n=242; In Canada n=81; Outside Canada n=12)*

***Caution! Small sample**



Average **2.1** trips taken
in-province



Average **1.2** trips taken
to other destinations in
Canada



Average **1.1** trips taken
to destinations outside
Canada

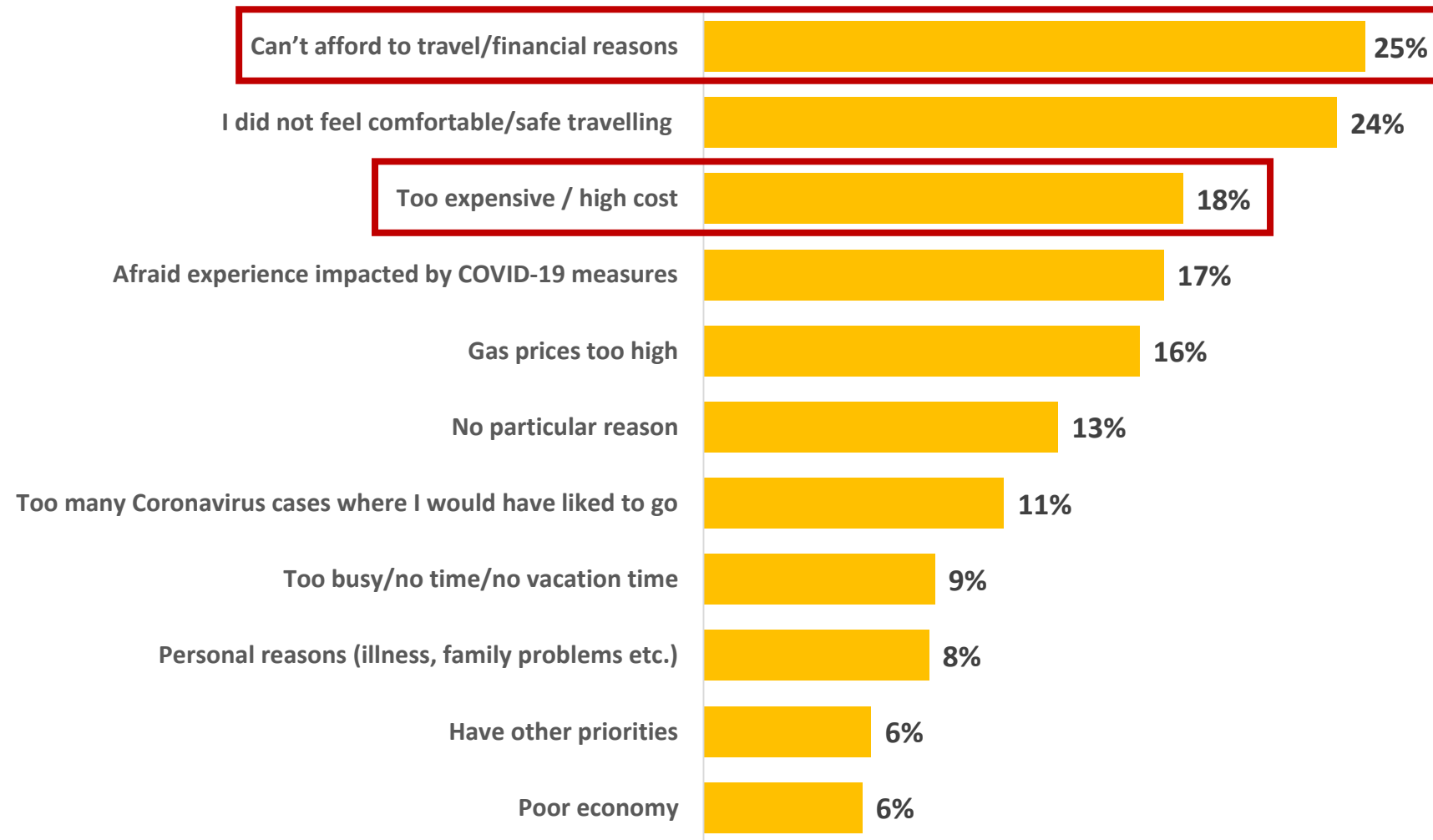
- Nearly half of NL residents (46%) who travelled in-province made just one trip while another 28% made two trips. Just one quarter of residents took three trips or more in the province
- 85% of residents who travelled to other Canadian destinations took just one trip there, with another 10% taking two trips
- Nearly all residents (95%) who travelled outside Canada took just one trip during the May to October period in 2021
- Overall, trip frequency is similar to 2020, with residents who travelled in-province taking an average of 2.1 trips in the province; those travelling to other places in Canada took 1.2 trips there and those travelling outside Canada took 1.1 trips to these destinations

- While residents didn't take an overnight pleasure trip in 2021 for a variety of reasons, it was mostly affordability and cost issues as well as the pandemic which curbed enthusiasm to travel
- One quarter of residents did not travel due to financial reasons while 18% found travelling too expensive. 16% felt gas prices were too high to take a trip
- Nearly a quarter of residents did not feel comfortable travelling during the pandemic while 17% were afraid that their trip experience would be impacted by the COVID-19 health and safety measures, with the number of COVID cases at the desired destination also playing a role for 11% of residents in their decision not to travel

Barriers to Summer/Fall Travel

Reasons for not taking overnight pleasure trips between May and October 2021

Residents who did not take a trip between May and October 2021 (n=248)

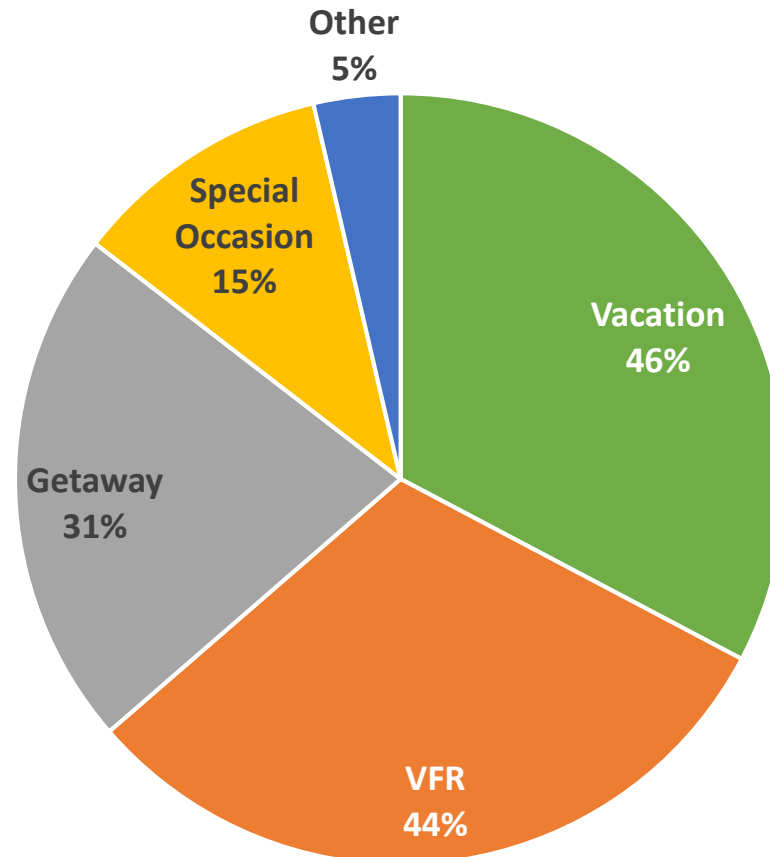


- Residents were equally likely to travel in-province this past season for vacation or to visit family or friends, with nearly half of residents travelling for either purpose
- 31% of residents went on getaway trips while 15% took trips for a special event or occasion (wedding, anniversary, birthday)
- 30% of residents who took overnight trips in the province this past season visited a destination for the first time, including a range of attractions as well as communities across the whole province

NL Summer/Fall Travel

Main purpose of overnight pleasure trips taken in NL between May and October 2021

Residents who took an overnight pleasure trip (n = 247)



30%
of NL residents visited a destination
for the
first time

First-time destinations

- Bonavista and area
- Corner Brook
- Dildo / Dildo brewery
- Deer Lake
- Fogo Island
- Gros Morne and area
- Lighthouses
- Signal Hill
- Twillingate

NL Summer/Fall Travel

Trip length of overnight pleasure trips taken in NL between May and October 2021, shares of trips by purpose

Residents who took overnight pleasure trips in NL (Vacation n=171; VFR n=182; Getaway n=108)



Vacation

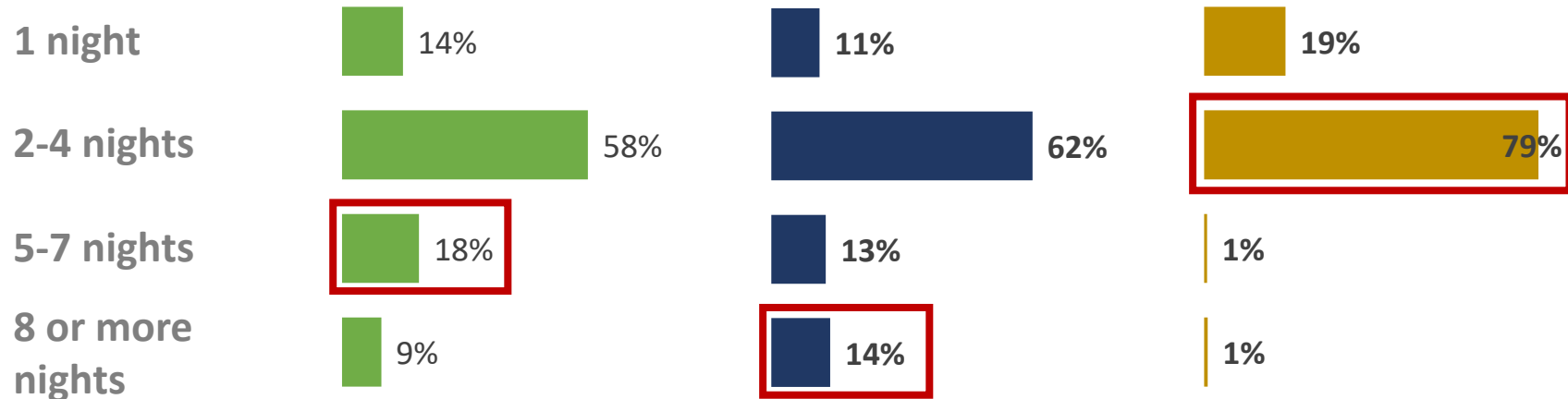


VFR*

*VFR: visiting relatives or friends



Getaway



Average trip length

4.3 nights

4.8 nights

2.2 nights

- Overall trip length of overnight pleasure trips this past season was 3.8 nights, with most trips (29%) lasting just 2 nights and another 22% of trips lasting 3 nights
- Only 8% of all trips that residents took this past season went longer than one week
- While trip length varied somewhat by trip purpose, trips of 2 to 4 nights were the most common for vacation, VFR and getaway trips
- VFR trips were the most likely to last 8 nights or more (14%) while nearly 1 in 5 vacation trips (18%) lasted 5 to 7 nights
- At 4.8 nights, average trip length was longest for VFR trips, with vacation trips just a little shorter at 4.3 nights. Not surprisingly, getaway trips had an average length of just 2.2 nights

- During summer and fall 2021, residents travelled to all regions of the province, with St. John's being the most popular
- The province's capital city welcomed 42% of residents who took a trip this past season, accounting for a 27% share of trips made and a quarter of nights spent overall
- The Western region was the second most popular among residents, with one third visiting and nearly one quarter of trips (23%) made there
- The Eastern and Central regions were nearly equally popular, both in terms of shares of residents visiting and trips
- Length of stay varied by region visited, with Labrador and Central region visits lasting the longest at 5.0 and 4.9 nights respectively

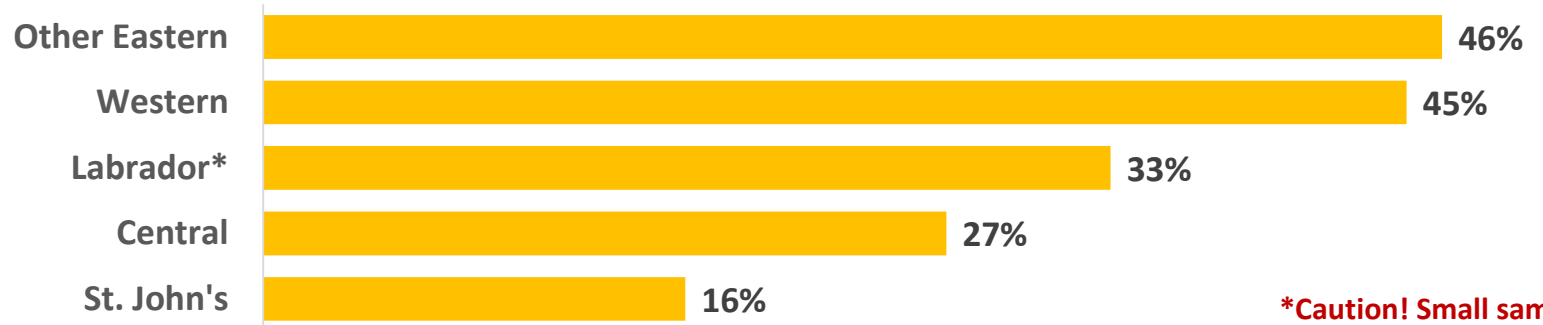
NL Summer/Fall Travel Destinations

Primary destinations and nights spent of overnight pleasure trips taken in NL between May and October 2021

Residents who took overnight pleasure trips in NL (n=247)

Region of Visit	Share of Residents Visiting	Share of Trips	Share of Nights	Average Length of Stay
St. John's/NE Avalon	42%	27%	25%	3.5 nights
Western	34%	23%	26%	4.4 nights
Eastern	30%	19%	17%	3.5 nights
Central	27%	18%	21%	4.9 nights
Other Avalon	19%	11%	9%	2.9 nights
Labrador	3%	1%	2%	5.0 nights

Share of residents who travelled in their own region



***Caution! Small sample size**

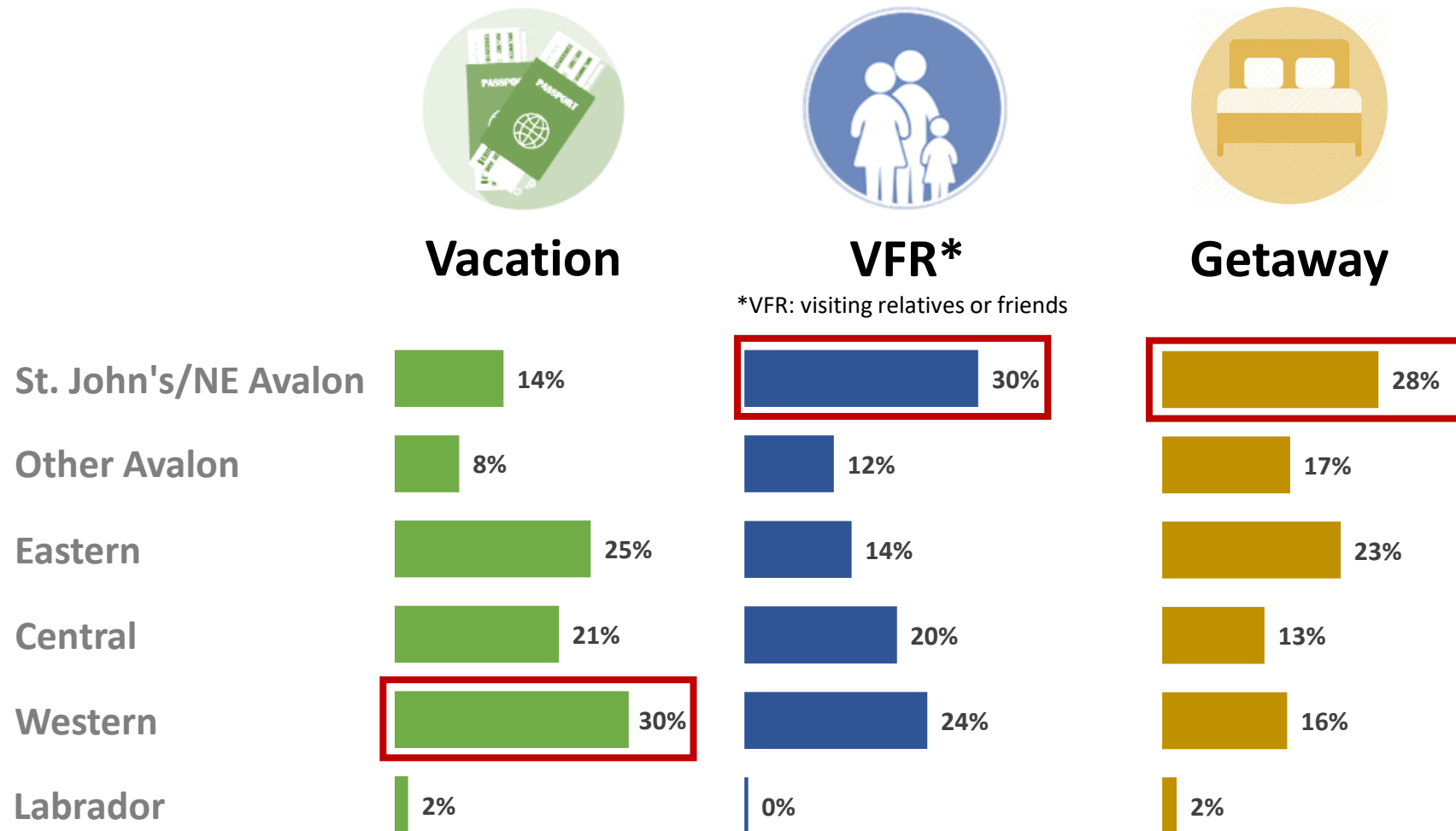
Read: 45% of Western region residents took overnight pleasure trips with a primary destination in the Western region

- While residents visited all regions across the province during their overnight pleasure trips, primary trip destinations varied by trip purpose
- At 30%, most vacation trips were made to the Western region, while a quarter of vacation trips had a primary destination in the Eastern region, with nearly as many trips made to the Central region (21%)
- With nearly a quarter of trips (24%), the Western region was also popular among residents who travelled in the province to visit relatives or friends, only to be topped by the capital region where residents made 30% of all VFR trips
- With 28% and 23% of trips respectively, the capital and Eastern regions were the most popular destinations for getaway trips

NL Summer/Fall Travel

Destinations of overnight pleasure trips taken in NL between May and October 2021, shares of trips by purpose

Residents who took overnight pleasure trips in NL (Vacation n=171; VFR n=182; Getaway n=108)

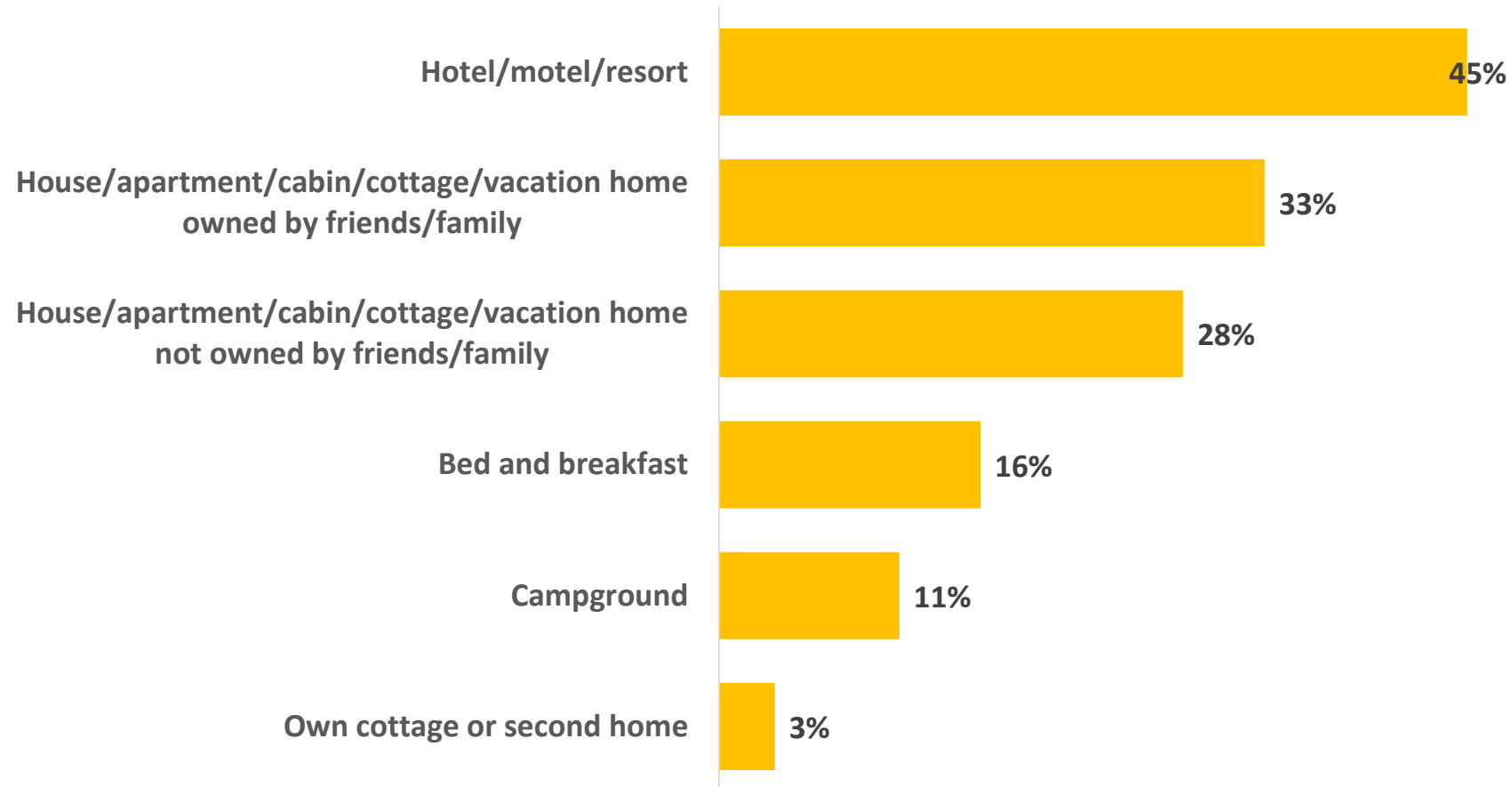


- Residents used a variety of accommodations during their overnight trips in NL, with hotels/motels/resorts being the most popular, with nearly half of residents (45%) staying there
- One third of residents (33%) stayed at a place owned by family or friends during their trips
- Nearly 1 in 3 residents (28%) stayed at a house, cabin or vacation home that is not owned by friends or family while 16% opted for a B&B, a significant increase over 2020
- Just over 1 in 10 residents (11%) stayed at a campground
- Compared to other age segments, younger residents (18-34) were the most likely to stay at any type of accommodation but in particular at B&Bs, hotels and campgrounds

NL Summer/Fall Travel

Accommodations used during overnight pleasure trips taken in NL between May and October 2021

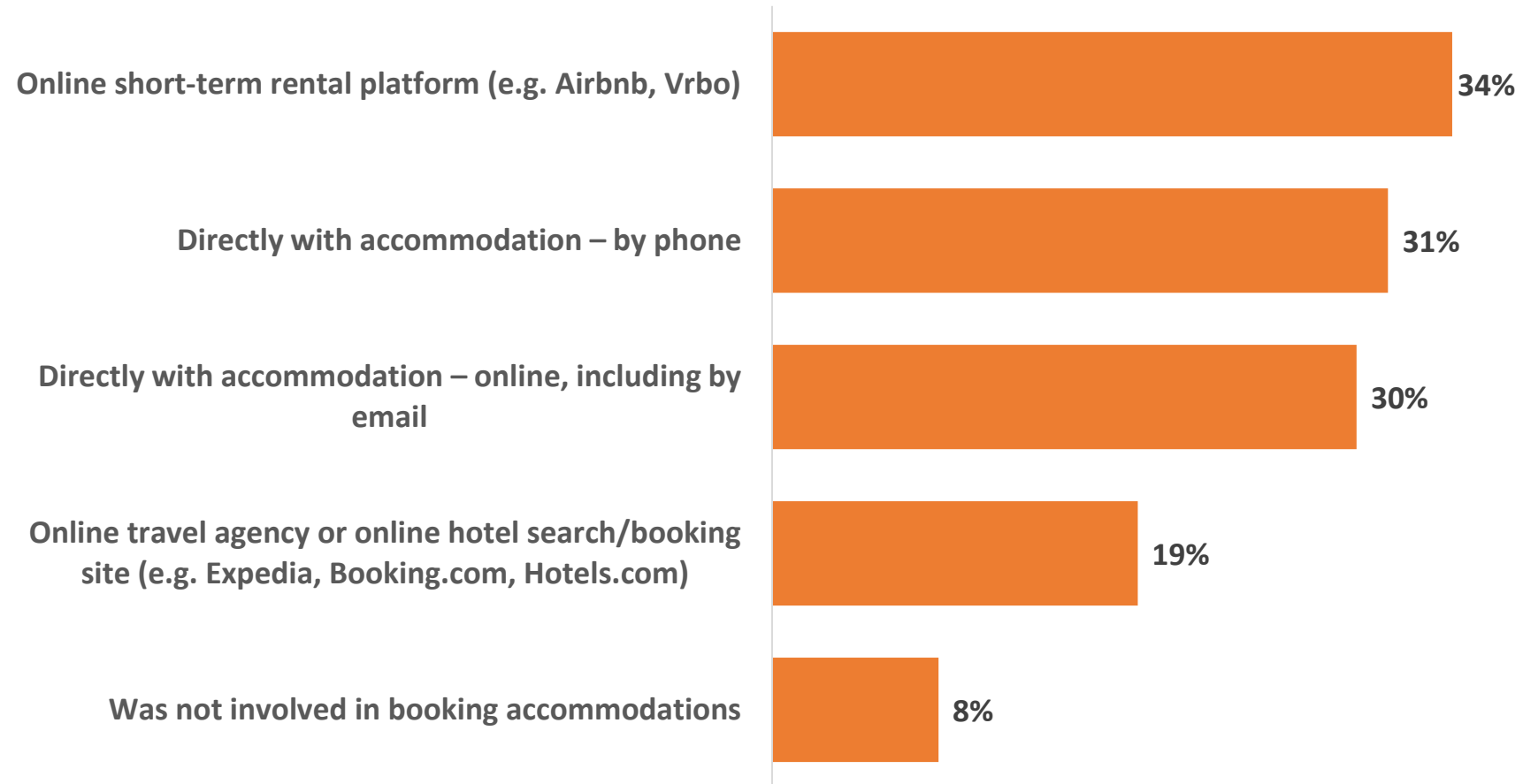
Residents who took overnight pleasure trips in NL (n = 247)



NL Summer/Fall Travel

Booking method for paid accommodations

Residents who took overnight pleasure trips in NL and stayed in paid accommodations (n = 187)



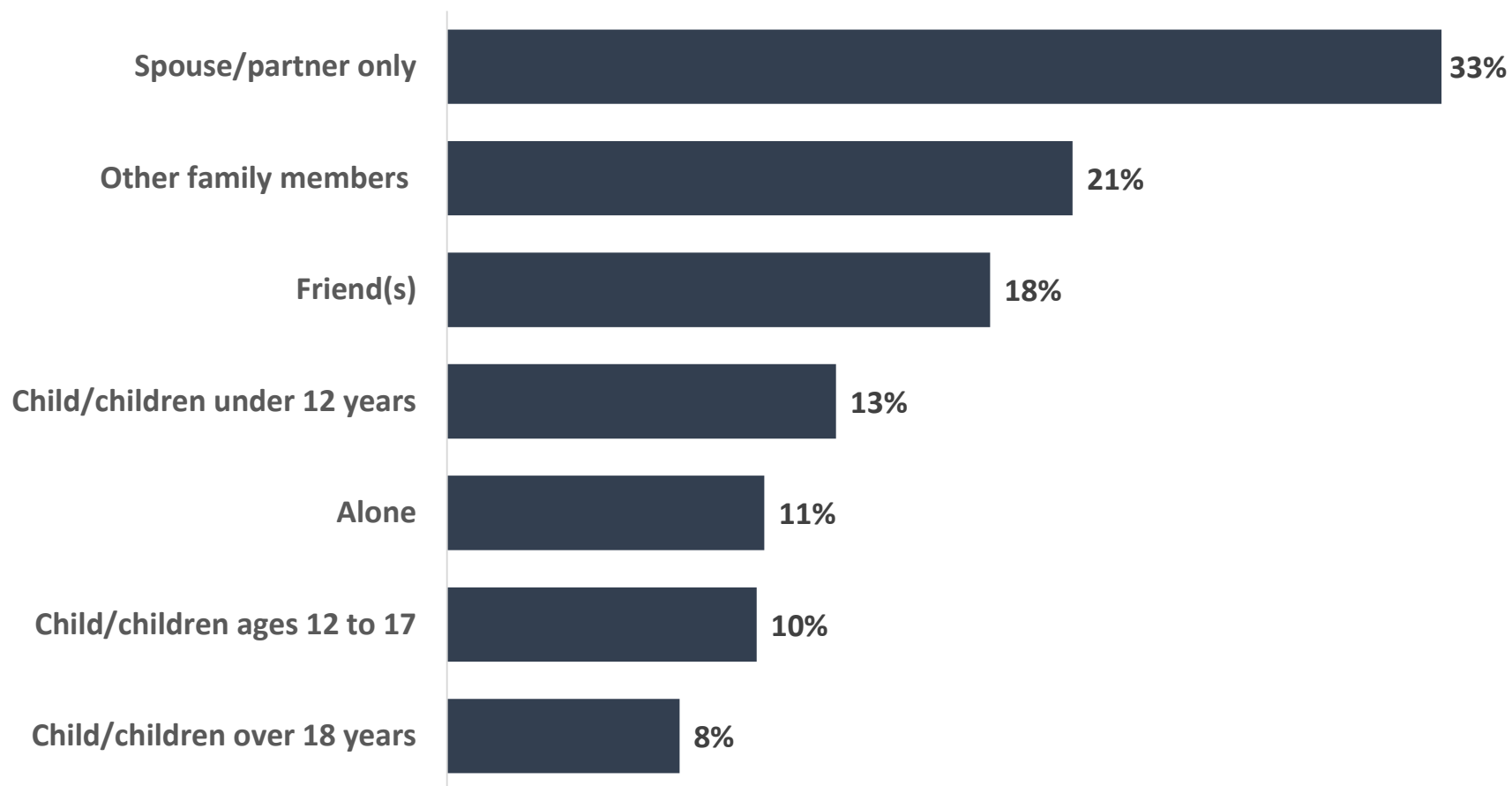
- Residents used various methods to book their paid accommodations. Online short-term rental platforms were the most popular, with 34% of residents using these. Popularity of these platforms soars to 62% among 18-34 year old residents
- Booking directly with accommodations – either by phone (31%) or online (30%) are nearly as popular
- At 41%, booking directly with the accommodation provider by phone is the preferred method among older (55+) residents
- At 19%, general online resources such as Online Travel Agencies or hotel booking sites were used to a lesser extent by residents

- NL residents were by far the most likely to travel with a spouse or partner this season, with one third doing so
- While nearly a quarter of NL residents (21%) were travelling with other family members (including parents, grandparents), nearly as many travelled with friends (18%)
- NL residents were almost as equally likely to have travelled with children under 12 (13%) as they were to have travelled with teenaged children (10%)
- Only about 1 in 10 residents indicated that they travelled alone this past season

NL Summer/Fall Travel

Travel parties during overnight pleasure trips taken in NL between May to October 2021

Residents who took an overnight trip in NL (n = 247)

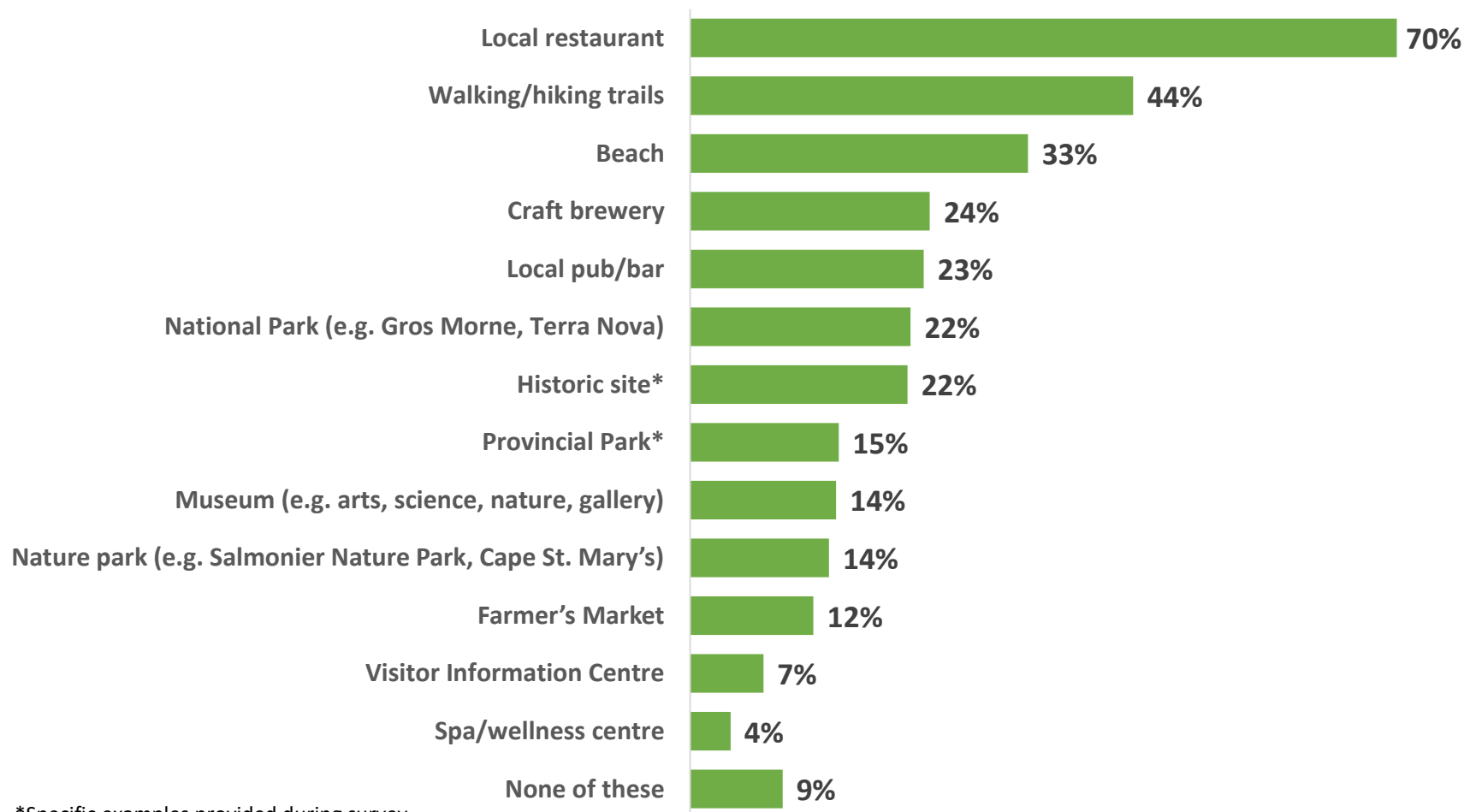


- Residents visited various sites, places and attractions while travelling at home this past summer and fall, with local restaurants topping the list
- Significantly fewer residents – 44%, went on walking/hiking trails while 33% visited a beach and nearly a quarter each went to a craft brewery (24%) or local pub/bar (23%)
- National parks (22%) were more slightly more popular than provincial parks (15%) and historic sites (22%) garnered more visits from residents than museums (14%)
- Many places and attractions, especially the parks and museums were more popular among younger NL residents (18-34) than among residents of other ages

NL Summer/Fall Travel

Places and attractions visited during overnight pleasure trips taken in NL between May and October 2021

Residents who took overnight pleasure trips in NL (n=247)



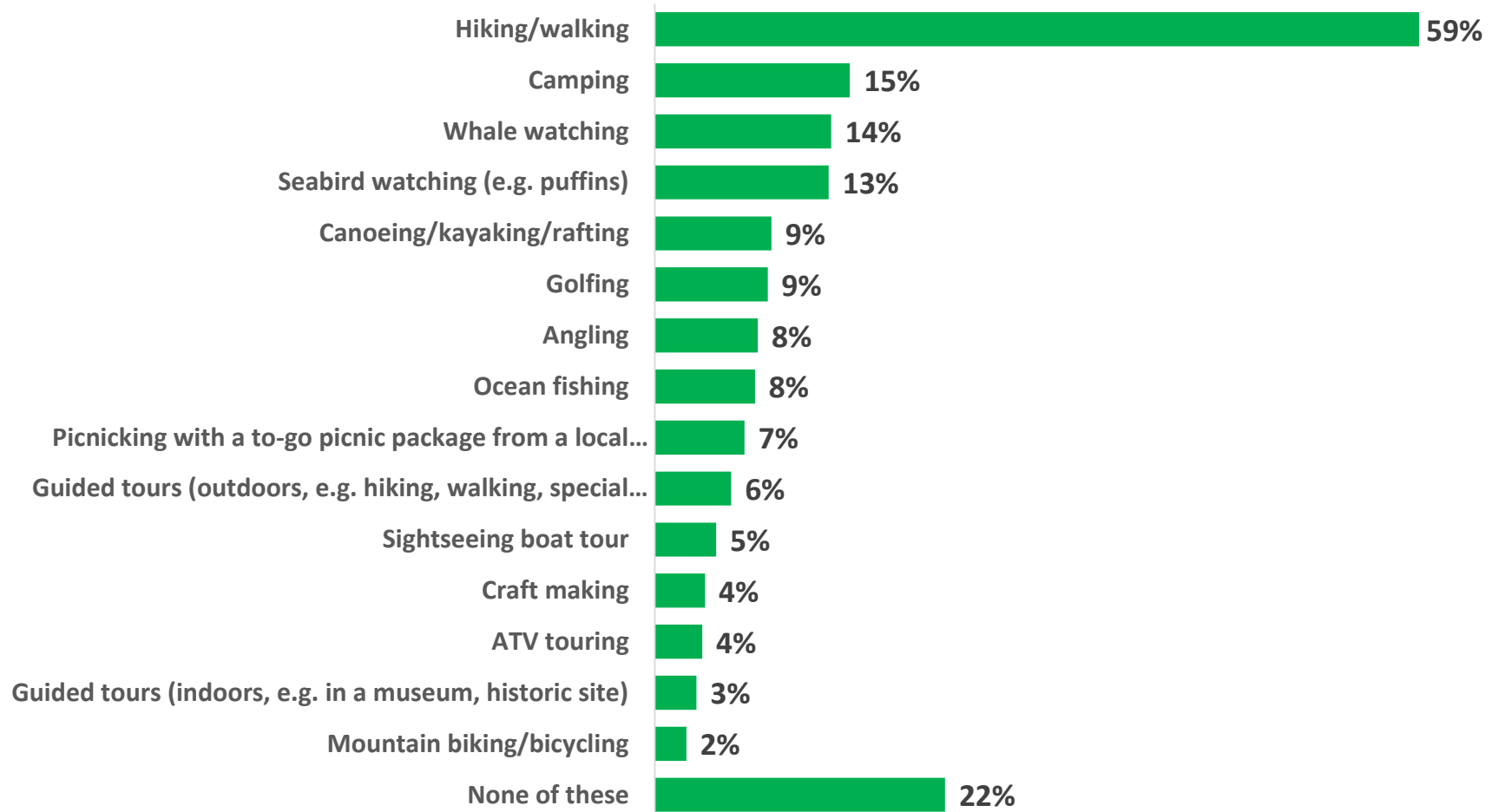
*Specific examples provided during survey

- Similar to 2020, while over half of residents (59%) engaged in hiking/walking during their in-province trips, they do not appear to have participated in many other activities to a great extent. This is likely the effect of activities not being available where residents visited and lower interest in pursuing these activities in general
- Water-based activities such as whale watching, ocean fishing, seabird watching and angling were among the most popular activities
- Both hiking/walking and golfing saw the biggest gains in participation compared to 2020
- While nearly a quarter of residents did not participate in any of the activities, participation in activities was generally highest among the younger age groups and very low among residents aged 55+

NL Summer/Fall Travel

Participation in activities during overnight pleasure trips taken in NL between May and October 2021

Residents who took overnight pleasure trips in NL (n=247)



- As in 2020, residents reported a great variety of most memorable experiences but they enjoyed spending time with family and friends more than anything else
- For many residents, outdoor activities like hiking, fishing, swimming, camping and boat tours provided a host of memorable moments during their trips while the province's natural beauty and amazing scenery was equally memorable
- Many a resident's memorable moments are also associated with local eating places and the food they offered
- While watching wildlife was a trip highlight for many residents, experiencing new things and exploring communities for the first time was also memorable for others

NL Summer/Fall Travel

Most memorable experiences during overnight pleasure trips taken in NL between May and October 2021

Residents who took overnight pleasure trips in NL (n=247)



Spending time with family and friends



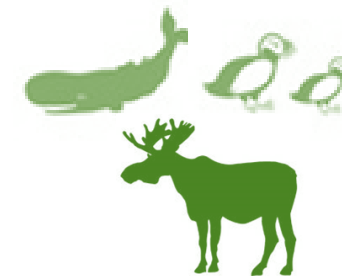
Outdoor activities



Beauty of the province, nature, scenery



Local restaurant and food experiences



Seeing/watching wildlife

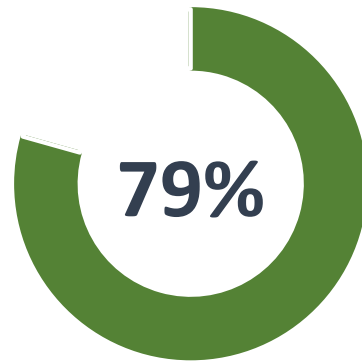
- Generally, residents who travelled in the province this past season reported high satisfaction levels with various aspects of their trips
- Highest satisfaction levels were noted for trip experiences, activities and attractions at 82% while residents indicated similarly high satisfaction with local cuisine and paid accommodation facilities
- Residents also appear to have been satisfied with the customer service they received in restaurants as well as in paid accommodations
- At 74%, residents were noticeably less satisfied with the perceived value for money for their trips
- This year's travel experiences in NL bode well for keeping the momentum, as **93%** of residents would consider taking an overnight pleasure trip again in 2022

NL Summer/Fall Travel

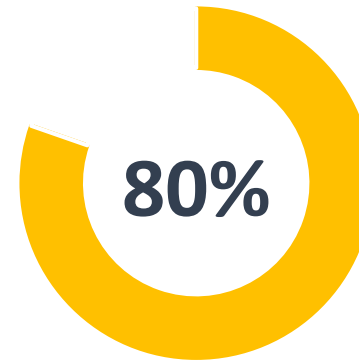
Satisfaction with aspects of overnight pleasure trips taken in NL between May and October 2021

Residents who took overnight pleasure trips in NL rating satisfaction at 8 or higher (scale of 1-10)

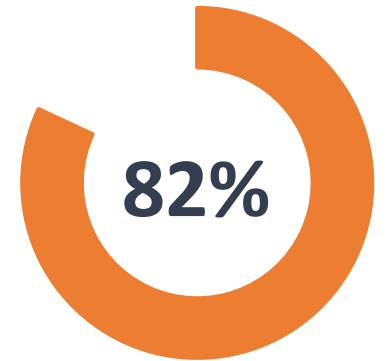
Local cuisine in restaurants



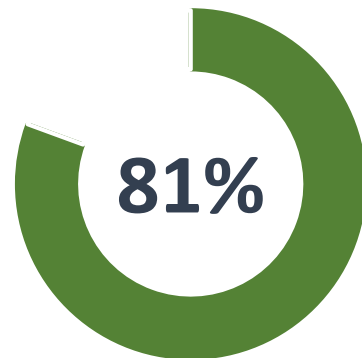
Paid accommodations (facilities, amenities)



Experiences, attractions, activities



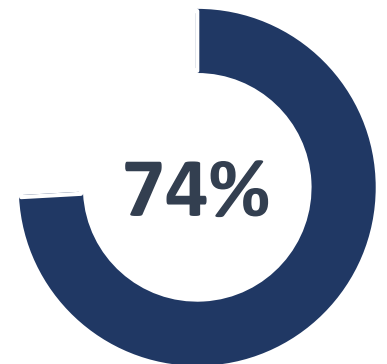
Customer service in restaurants



Paid accommodations (customer service)



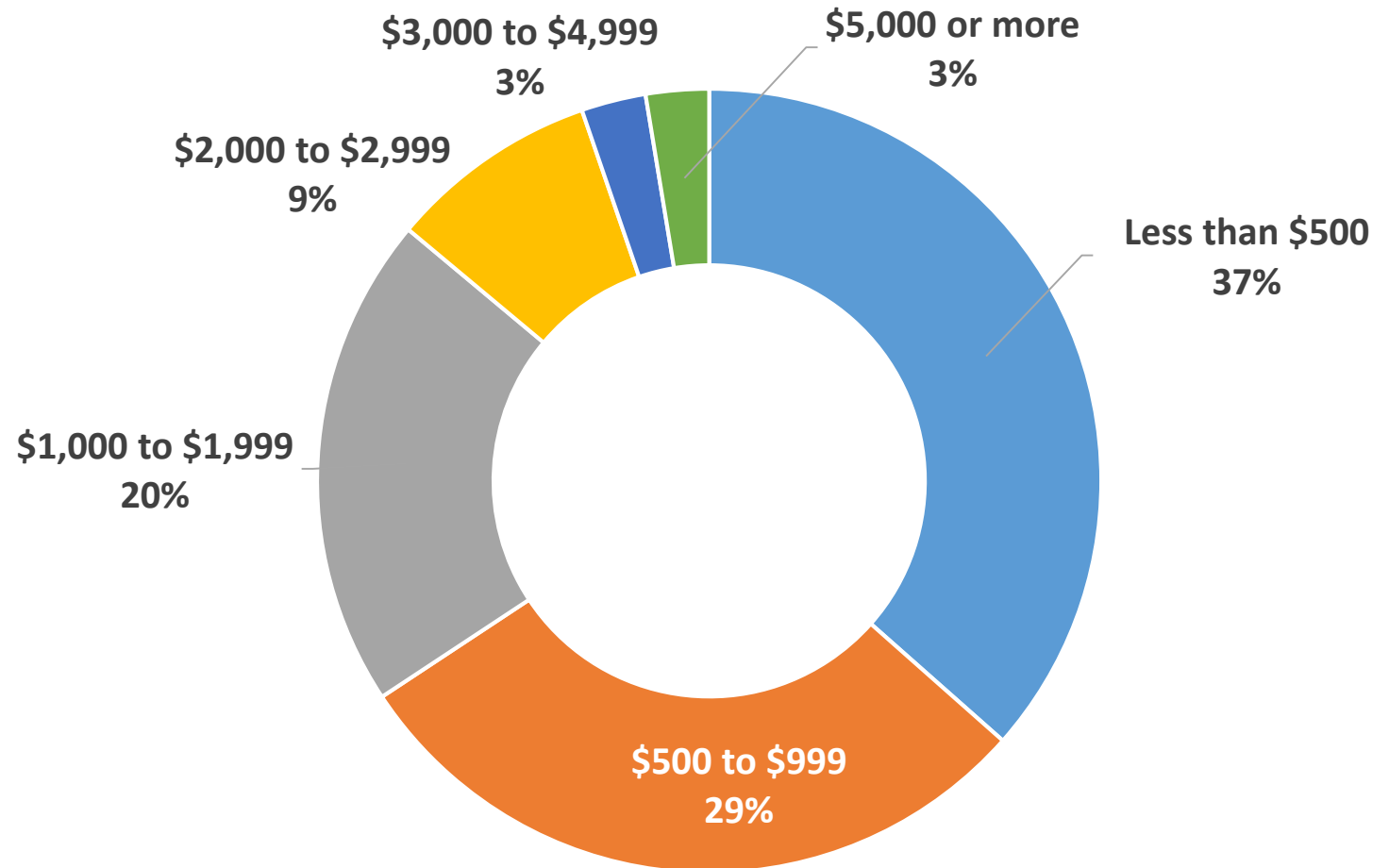
Value for money



NL Summer/Fall Travel

Spending on overnight pleasure trips taken in NL between May and October 2021

Residents who took overnight pleasure trips in NL (n=247)

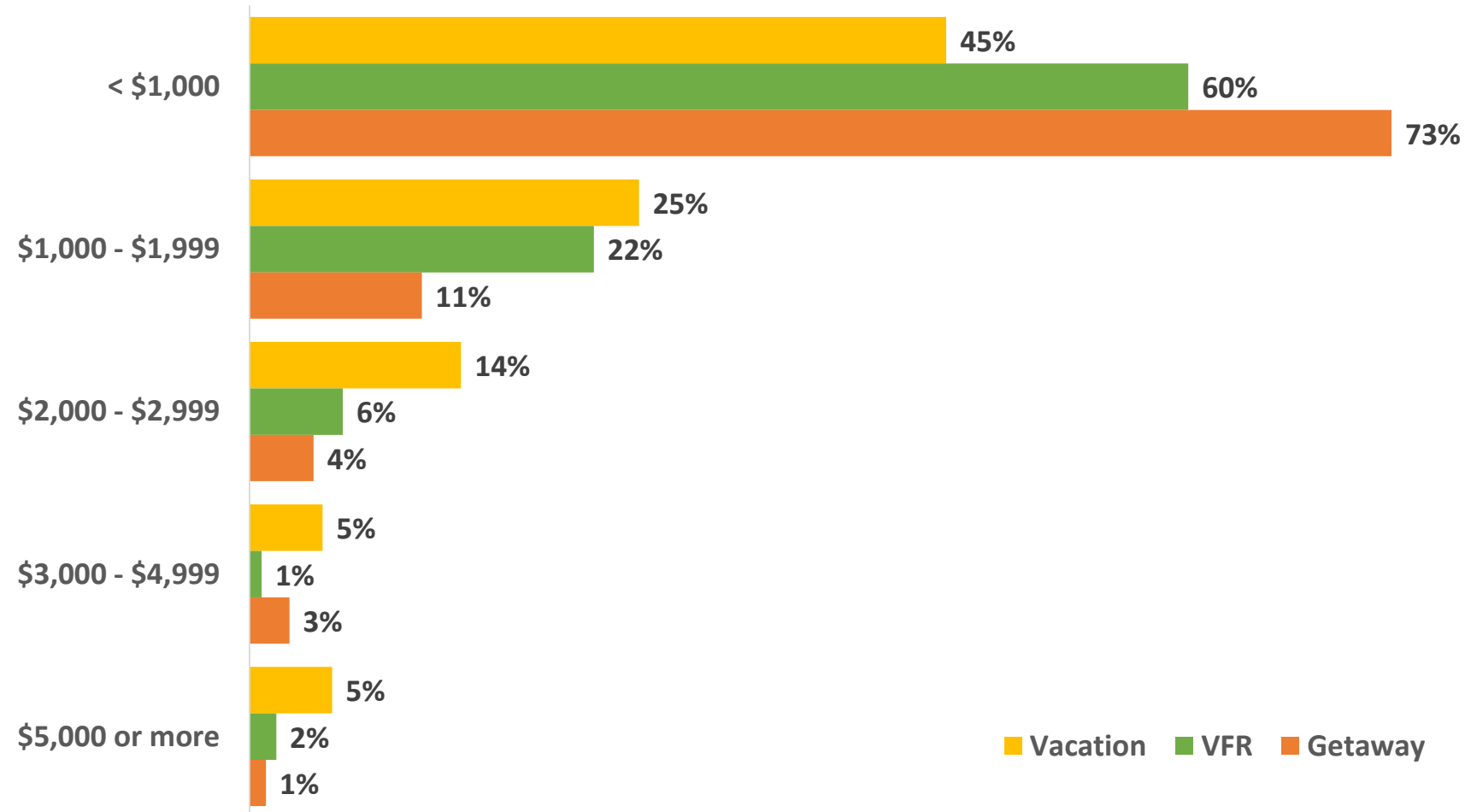


- Spending on overnight pleasure trips was typical considering the types and length of trips residents took, with just over a third of residents (37%) spending less than \$500 and another 29% spending between \$500 and \$999
- 29% of residents spent between \$1,000 and \$3,000, including 20% who spent between \$1,000 and \$2,000 on their in-province trips
- Just 5% of residents spent \$3,000 or more while travelling in the province this past season, including 3% who spent over \$5,000
- Spending patterns did not differ among the various age groups, with approximately 60% each of all age segments (18-34, 35-54, 55+) spending less than \$1,000 on their overnight trips

NL Summer/Fall Travel

Spending on overnight pleasure trips taken in NL between May and October 2021

Residents who took overnight pleasure trips in NL (vacation n=174; VFR n=183; Getaway n=108)



- Given the different nature of specific trips, spending patterns varied greatly by trip purpose
- Residents who took getaway trips (73%) were the most likely to report spending less than \$1,000 whereas only 45% of residents who took vacation trips reported this level of spending
- Residents who travelled for vacation generally reported higher spending on their trips, with nearly a quarter (24%) spending \$2,000 or more. This same level of spending is only reported by 8% of those who visited relatives and friends (VFR) and 8% of those who took getaway trips
- Spending of over \$5,000 on trips was rare for any trip purpose but most likely among those who took vacation trips

- On May 17, the province launched its *Your Backyard Beckons* 2021 tourism marketing campaign to encourage residents to travel in their home province in 2021
- Among those who did travel at home, the campaign showed high awareness levels, with 51% of residents saying they were aware of the campaign
- Of those residents aware of the campaign, 69% already had firm plans to take an in-province trip at the time they became aware
- 29% of residents aware of the campaign said they were influenced by the campaign to take an overnight pleasure trip at home, with 61% of those residents indicating that they were extremely influenced by the campaign

Your Backyard Beckons 2021 Campaign

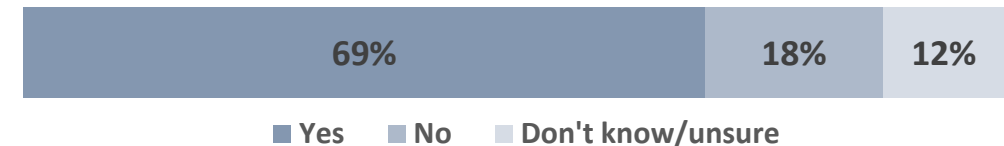
Awareness and influence of the province's Your Backyard Beckons 2021 tourism marketing campaign

Residents who took overnight pleasure trips in NL (n=247)

Residents who took overnight pleasure trips in NL in 2021 who were aware of the tourism marketing campaign



Existence of firm travel plans among residents when becoming aware of the campaign



Residents aware of the campaign who were influenced by the campaign to take a trip in NL



Level of impact of the campaign among residents who were influenced by the campaign



FUTURE TRAVEL PLANS
(November 2021 to October 2022)

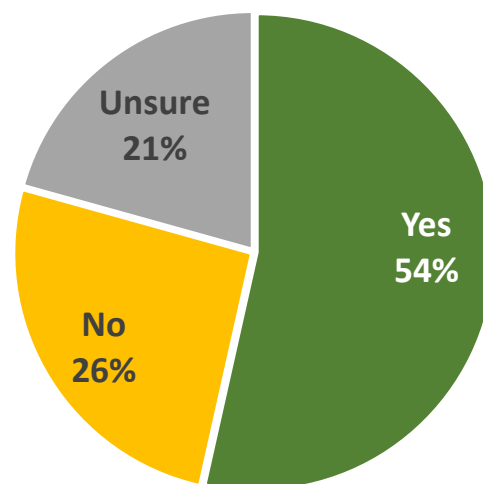
- When it comes to taking an overnight pleasure trip in NL in the next 12 months, residents are relatively enthusiastic at the moment, with over half (54%) indicating that they are planning to do so
- Only a quarter of NL residents (26%) currently does not have any plans to take an overnight trip in the province during the next 12 months while 21% are still undecided
- Plans for in-province trips in 2022 are consistent across all age groups
- Of those not planning in-province trips, 45% are planning to take a trip to other destinations while 53% are not planning to take any trips at all in 2022
- The top destination for current out of province trip plans is ON by far, followed by BC, AB and the US

2021 – 2022 Travel Intentions

Plans to take overnight pleasure trips in NL in the next 12 months (November 2021 to October 2022)

All residents (n=530)

Residents planning to take overnight pleasure trips in NL in the next 12 months



Residents planning to take overnight pleasure trips in NL in the next 12 months, by age



Residents with no in-province trip plans who are planning trips to other destinations

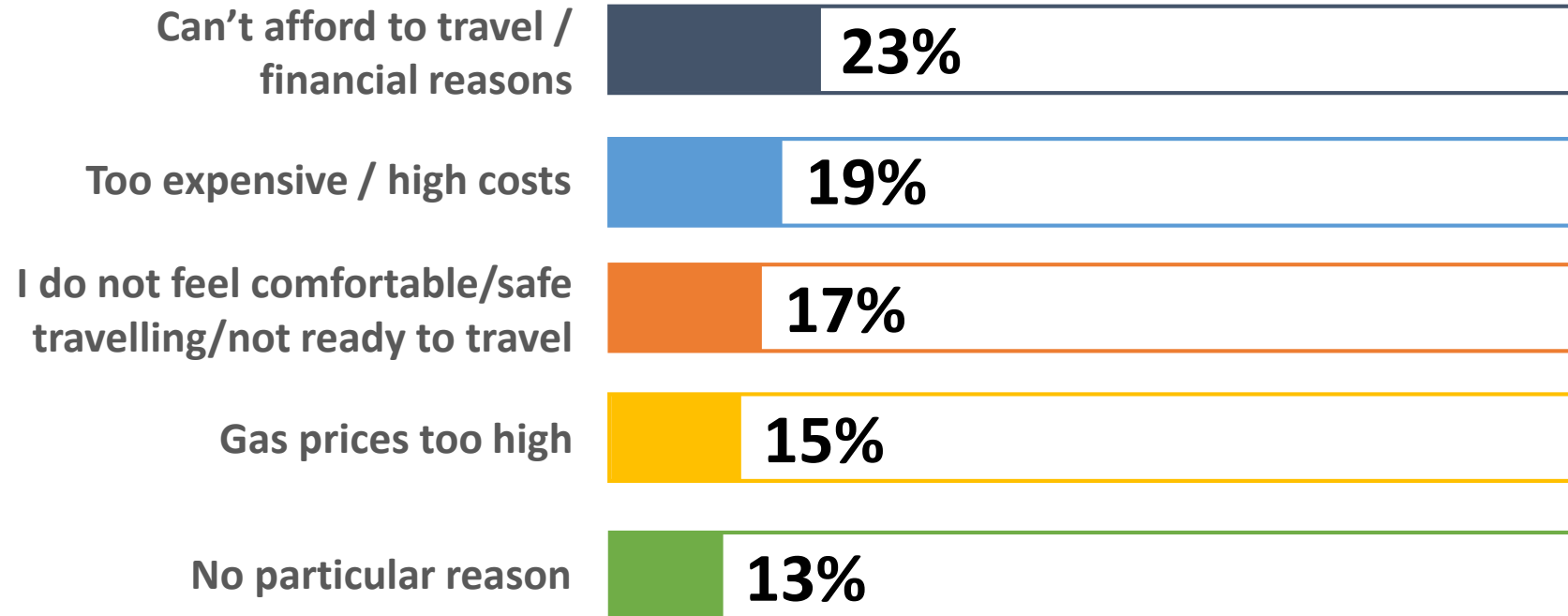
45%

Residents with no in-province trip plans who are not planning any other trips in next 12 months

53%

Barriers to Future Travel in NL

Reasons for not planning overnight pleasure trips in NL in the next 12 months (November 2021 to October 2022) Residents who do not plan to take a trip in NL (n=132)



Additional reasons:

- Have already visited everywhere I want to see in NL 8%
- I will decide later on any travel I will do in next 12 months 7%
- Poor weather 6%
- Have other priorities 5%

- Reasons for not planning to take overnight pleasure trips over the next 12 months are varied but most notably, three of the top five reasons are linked to affordability and the cost of travel
- While affordability/financial reasons top the list at 23%, almost as many residents (19%) feel that it is too expensive to travel and 15% find gas prices too high
- Nearly 1 in 5 residents (17%) still do not feel comfortable or safe to travel in their own province
- Interestingly, just over 1 in 10 residents (13%) have no particular reason not to travel at home while 8% feel they have already seen everything they wanted to see
- A relatively small share of residents (7%) still keep their options open and will decide later on any trips

Path to Purchase for Travel in NL

Residents' current stage of trip planning for overnight pleasure trips in NL in the next 12 months (November 2021 to October 2022)

Residents who plan to take an overnight pleasure trip in NL in the next 12 months (n=285)



■ I am seriously considering taking the trip

■ I have started to gather some travel information for the trip

■ I am planning the itinerary for the trip

■ I am currently making transportation, accommodation or other travel arrangements

■ I have already made some bookings (e.g. transportation, accommodations)

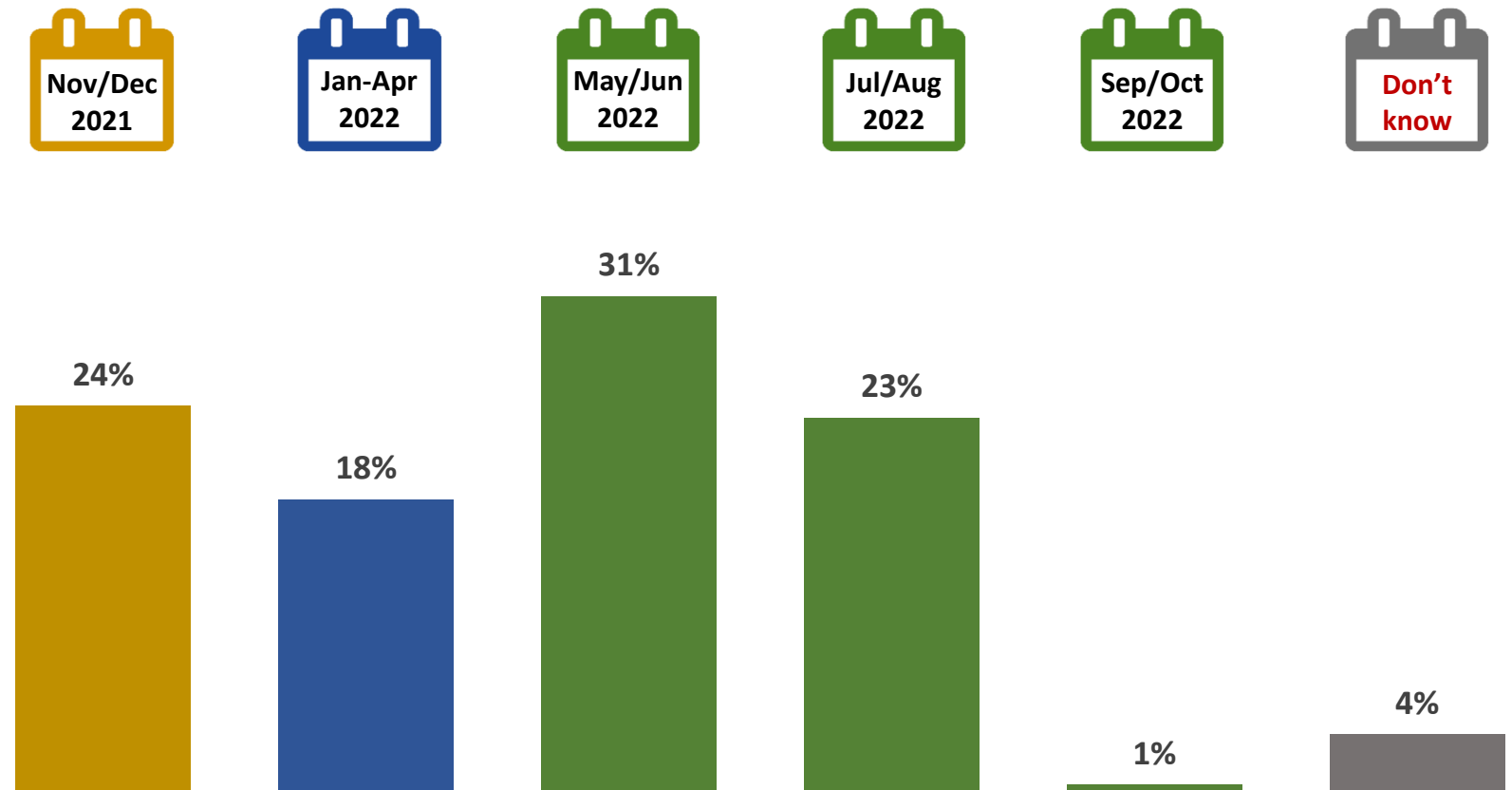
■ Unsure

- Residents who are planning to take an overnight pleasure trip in the province in the next 12 months are at varying stages of trip planning, providing some insight into the travel potential that may be realized
- More than half of residents (61%) are still at the consideration stage while 10% are unsure where exactly they are with their trip planning
- 29% of residents are in the active trip planning stage, including 16% of these residents who have just started to gather some travel information
- 4% each of residents are currently planning their trip itinerary and are making travel arrangements (accommodations, transportation)
- Another 6% of residents are a little further ahead and have already made some travel bookings

Timing of Travel Intentions

*Earliest month for taking overnight pleasure trips in NL in the next 12 months
(November 2021 to October 2022)*

Residents who plan to take an overnight pleasure trip in NL in the next 12 months (n=285)



- When it comes to the earliest month* residents are planning to travel, residents' responses were likely influenced by the timing of the survey, with a quarter indicating their earliest trip in Nov/Dec 2021, with most residents travelling to visit family or for a special occasion during those months
- An 18% share of residents indicating an earliest trip date between January and April 2022 suggests that there is some potential for winter tourism
- With more than half of residents (54%) indicating an earliest trip date between May and October 2022, the peak season promises good travel potential, especially for vacation and getaway trips

*Due to question wording, travel potential for individual months further out into 2022 may not be reflective of additional travel plans residents may have

- When it comes to why residents will travel in the next 12 months, no specific purpose stands out
- 29% of those planning to take a trip would go on a vacation trip while an equal share would take a trip to visit family and relatives
- As well, at 29%, residents are equally likely to take weekend getaway trips
- At just 7%, residents are less inclined to travel for a special event or occasion while only 3% plan a trip to visit friends
- While all age segments are equally likely to take vacation trips or trips to visit family, those aged 18-34 are most likely to travel for a special event whereas those aged 55+ are the least likely to go on a weekend getaway

2021 – 2022 Travel Intentions

Main purpose of overnight pleasure trips in NL in the next 12 months (November 2021 to October 2022)

Residents planning to take a trip in NL in the next 12 months (n=285)



Vacation

29%



**Visiting
family/
relatives**

29%



**Weekend
getaway**

29%



**Special
event/
occasion**

7%



**Visiting
friends**

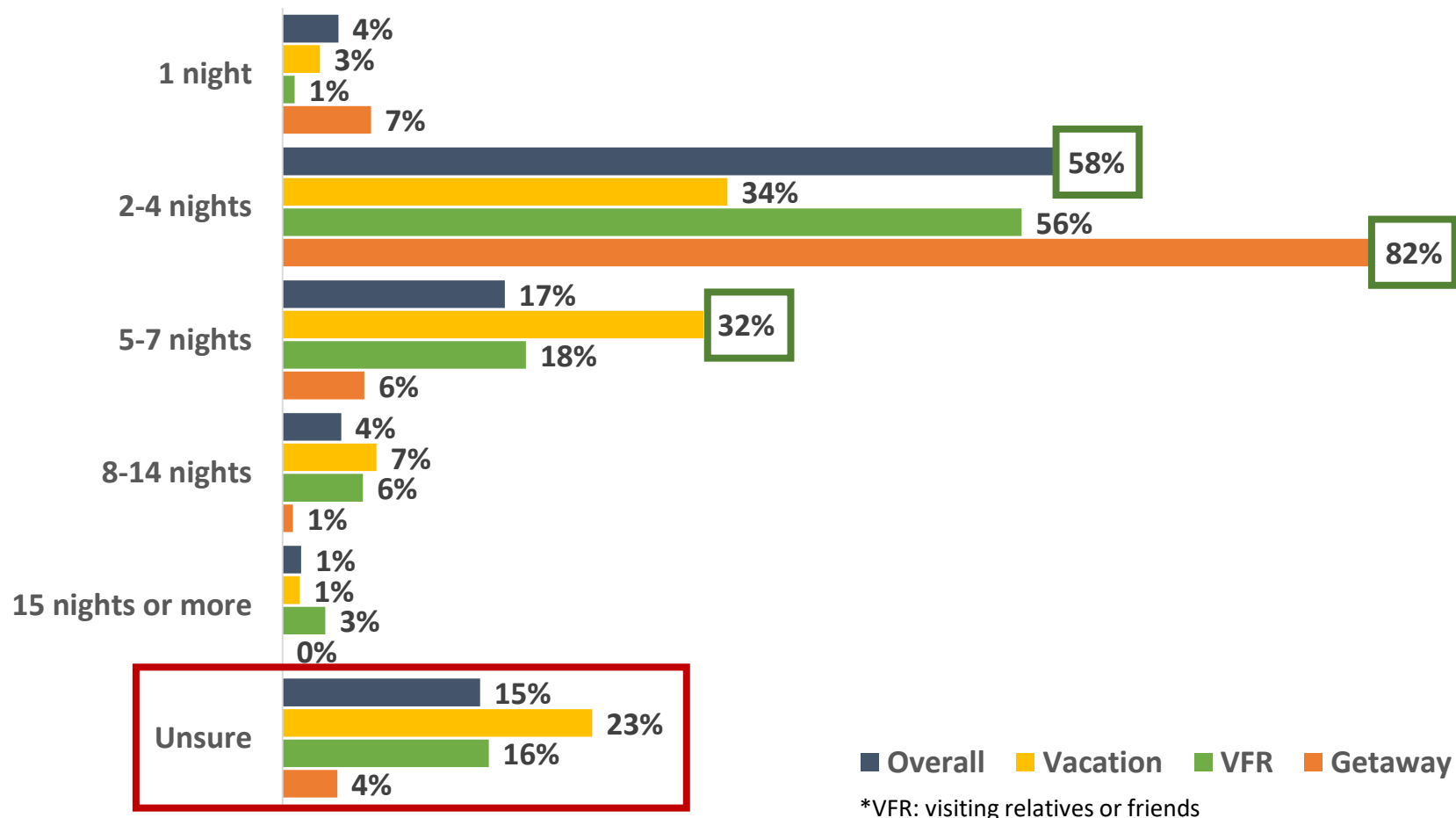
3%

- With an average of 4 nights per trip, trip length for upcoming trips by residents in the next 12 months will likely be similar to what was seen in the past 2021 season
- Overall, most residents are planning short trips, with 3 in 5 planning trips of 2-4 nights, with trips of 5-7 nights much less common
- Trips of more than one week are currently even much less likely
- Anticipated trip length varies greatly by purpose, with vacation trips trending longer than trips for other purposes while the majority of getaway trips won't exceed 4 nights
- Planned VFR trips will also likely be of shorter nature, however, additional travel potential can likely be unlocked as more than 10% of potential travellers are still unsure about their trip length

2021 – 2022 Travel Intentions

Trip length for planned overnight pleasure trips in NL in the next 12 months (November 2021 to October 2022), by purpose

Residents planning to take a trip in NL in the next 12 months (Overall n=285; Vacation n=85; VFR n=94; getaway n=80)*



Summary

Financial Impact of COVID-19 on NL Households

- The majority of residents indicated that the COVID-19 pandemic has had little impact on their personal or household finances. However, 26% of residents did report a big or dramatic impact on their finances, with those in the millennial age bracket and residents of the capital city more likely to indicate such a significant impact
- Over three quarters of residents made various large purchases in the past year, including the purchase of electronic devices, home renovations, home furnishings, appliances and vehicles, indicating that a large share of residents does have some discretionary spending power. This also includes spending on travel, with nearly a third of residents reporting that they took a vacation trip in the province and nearly 1 in 5 who took a vacation trip outside the province

Summer and Fall Travel in NL

- **Summer and Fall Travel:** Forty-six percent of NL residents took an overnight pleasure trip within the province between May and October 2021, averaging 2.1 in-province trips during this period. In comparison, only 16% took an overnight trip to other destinations in Canada and even fewer (3%) travelled abroad. For those residents who did not take an overnight trip this past summer or fall, affordability and cost of travel as well as pandemic related reasons were top barriers to travelling
- **Trip Purpose:** Residents were equally likely to travel in the province for vacation (46%) and to visit relatives or friends (44%), with nearly half of residents travelling for either purpose while only 15% went on a getaway trip. Residents also tended to go on more than one trip for the same purpose
- **Top In-province Destinations:** For residents who travelled within Newfoundland and Labrador, St. John's/North East Avalon and the Western region were the most popular destinations. Labrador (5.0 nights) and the Central region (4.9 nights) topped the list for length of stay. Top destinations varied by trip purpose, with the Western region being most popular for vacation trips. Nearly half of Eastern (46%) and Western (45%) region residents took at least one trip within their own region. Three in ten residents (30%) reported visiting an in-province destination or attraction for the first time

Summary

- **Travel Parties:** Residents were most likely to travel with a spouse or partner only (33%) while travelling with other family members (21%) or friends (18%) was somewhat less common. Only one in ten residents travelled alone
- **Top Activities & Attractions:** On their summer and fall trips within the province, residents were most likely to take in local restaurants, walking and hiking trails, beaches, craft breweries, pubs, national parks and historic sites. However, participation in specific activities remained generally low with the exception of hiking and walking
- **Most Memorable Moments:** Similar to 2020, the most memorable moments of residents' trips included spending time with family and friends, enjoying outdoor activities, experiencing the province's nature and scenery and sampling local food. Residents were generally satisfied with many aspects of their trip (restaurants, accommodations, experiences) whereas satisfaction with value for money was lagging other trip aspects. Based on this year's travel experiences, the vast majority of NL residents (93%) who travelled in-province in the summer and fall of 2021 said they would consider taking an overnight pleasure trip within NL again in 2022
- **Trip Spending:** Spending on in-province trips by residents was typical given the types and length of trips they took, with two thirds spending less than \$1,000, including 37% who spent less than \$500. Just 5% of residents spent \$3,000 or more. Spending levels varied greatly by trip purpose, with those residents taking a getaway trip most likely to spend less than \$500 while vacation travellers tended to spend higher amounts
- **Accommodations used:** Almost half of resident travellers reported that they stayed in a hotel, motel or resort during their trips, by far the most popular type of accommodation used. A third of residents stayed with family or friends and nearly as many stayed in other types of paid accommodations such as vacation homes, cabins, cottages and private houses not owned by family or friends. The use of campgrounds was similar to 2020 with 11% of residents reporting that they stayed there, whereas the popularity of B&Bs increased significantly compared to 2020. To book their paid accommodations, residents were most likely to use a short-term rental platforms and to book with the accommodation provider directly either by phone or online

Summary

Your Backyard Beckons 2021 Campaign Impact

- Half of residents who took an in-province trip were aware of the *Your Backyard Beckons* 2021 tourism campaign and 29% of those aware of the campaign said it influenced them to take an overnight trip within NL. One quarter of those who said the campaign influenced them to travel within the province said it was 'somewhat influential' while 61% said it was 'extremely influential' to their decision

2021-2022 Travel Intentions – Next 12 Months

- **Future Travel Intentions:** Just over half of residents are planning to take an overnight pleasure trip in NL between November 2021 and October 2022. One quarter of residents currently do not have any plans to travel in-province in the next 12 months. Interestingly, in-province travel intentions are consistent among residents of all age groups. Of those who currently do not have in-province travel, 45% are planning trips to other destinations while over half (53%) have no other travel plans at all
- **Barriers to Travel:** While the pandemic still weighs on residents' minds and prevents nearly 1 in 5 from travelling in-province in the next 12 months, financial reasons and travel costs are trending once again as top barriers to in-province travel
- **Path to Purchase:** While many residents do have plans for travelling at home, the majority of these residents are just at the consideration stage of the path to purchase. However, 29% of residents are already actively planning their trips, including 6% of residents who have already made some travel bookings
- **Trip Timing – next 12 months:** Likely influenced by the timing of the survey (Nov 2021), one quarter of residents indicated trip plans for Nov/Dec 2021. However, residents' most likely months for earliest travel in the next 12 months are the peak season months, with the spring shoulder (June) promising much potential. While most residents are planning trips of 2 to 4 nights, a fair share remain undecided about how many nights they might spend on an in-province trips, especially those planning to take vacation trips

Recommendations

- While the COVID-19 pandemic curbed some residents' enthusiasm to travel even within their own province, over 40% of residents did take an average of 2 trips this past summer/fall at home. At nearly 4 nights per trip, residents enjoyed family time and outdoor activities, continuing the momentum that was built in 2020. Travel momentum looks also promising for the next 12 months as nearly all residents (93%) who travelled in 2021 would do so again in 2022. With comparatively high levels of trip satisfaction, this provides for an opportunity to continue to build on 2020 and 2021 experiences to entice even more residents to travel at home
- As both 2020 and 2021 have shown, a fair share of residents has been discovering in-province destinations and attractions for the first time, including those that are also most popular with non-resident visitors (e.g. Bonavista peninsula, Gros Morne and Fogo Island). Stimulating interest and attracting more residents to discover something new in their home province as well as showcasing destinations and sites that may be considered 'hidden gems' continues to be a solid opportunity to grow resident tourism
- During both their 2020 and 2021 summer/fall trips, residents showed a clear preference for checking out local restaurants, walking and hiking trails, beaches, pubs/bars, historic sites and craft breweries. Looking ahead to 2022, packages and content featuring local food and drink opportunities along with nearby hiking trails, beaches, parks and historic sites may help encourage more residents to vacation in-province during the next travel season
- As spending time with family and friends was the most memorable part of residents' 2020 and 2021 summer/fall trips within the province, emphasizing the opportunity for family time while also exploring the province and taking in new sites and activities should resonate well with residents again into the 2022 season
- As financial concerns and the affordability and cost of travel are making a come-back as serious travel barriers, understanding residents' sense of value is key to adapting offers to get them to travel, with a keen focus on delivering memorable experiences at every stage of the visitor journey – delivering 'value for money' has never been more important than it is now