

Newfoundland and Labrador Resident Travel Survey

December 2020

Background and Survey Methodology

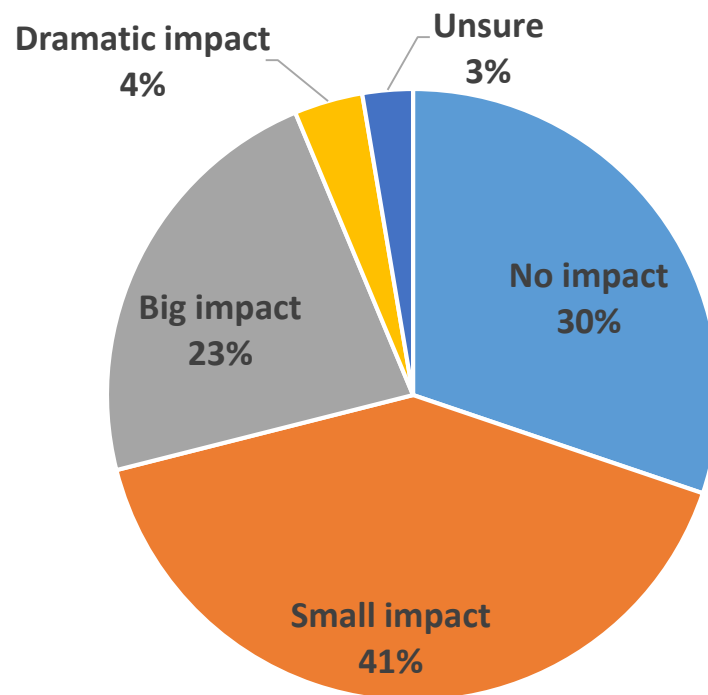
- **The Coronavirus pandemic in 2020 has led to significant limitations of travel activity across the globe, with most travel strongly discouraged or even prohibited, and many jurisdictions closing their borders to all or certain types of visitors**
- **To control the spread of COVID-19 in Newfoundland and Labrador, travel restrictions have been banning all non-essential travel to the province since May. With infections low in the Atlantic Canada region, the “Atlantic Bubble” came into effect on July 4, 2020, allowing residents of the four Atlantic Canadian provinces to travel within those provinces without restrictions and no requirement for self-isolation***
- **As travel restrictions remain in place, NL residents continue to drive tourism activities in NL during the winter. To evaluate in-province summer 2020 travel and inform marketing campaigns and experience development, Newfoundland and Labrador Tourism conducted a survey with NL residents on their past summer travel and coming winter travel intentions**
- **The NL resident survey was conducted November 9 to 16; the sample included 500 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)**

***Atlantic Bubble is on hold as of November 25; Maritimers can visit NL but have to self-isolate for 14 days upon arrival**

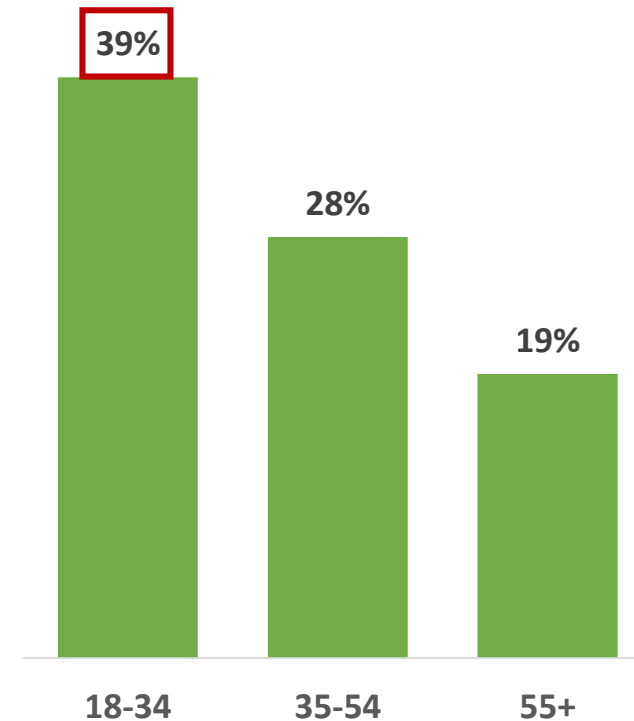
Financial Impact of COVID-19

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

All residents (n=500)



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

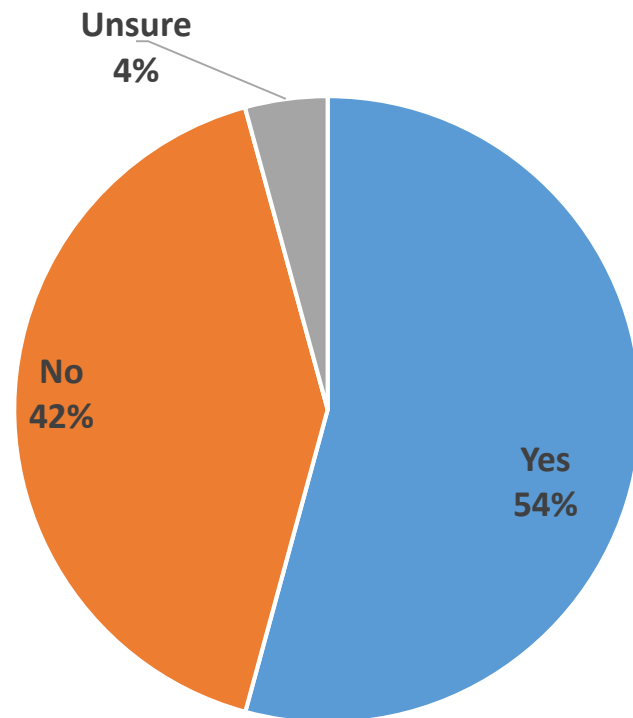


- Generally, pleasure travel is dependent on available discretionary household funds which have been impacted to varying degrees by the COVID-19 pandemic
- Nearly three quarters of NL residents (71%) reported that the pandemic has had no or only a small impact on their personal/household finances
- However, the impact does vary by age, with nearly 40% of younger NL residents (age 18-34) reporting a big/dramatic impact while the same is the case for only 19% of those 55+
- With 33% reporting a big or dramatic impact, residents of the Central region appear to be more affected financially than residents in other regions

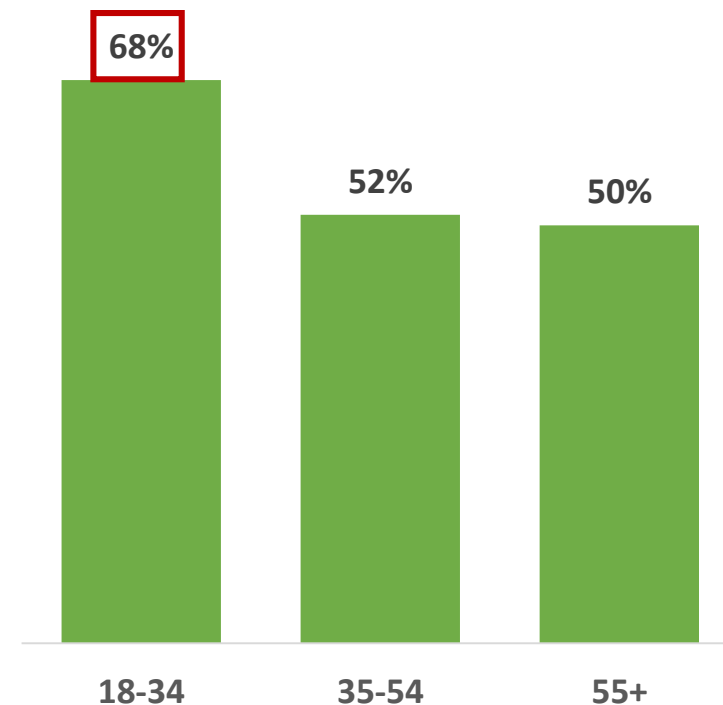
Financial Impact of COVID-19

Have you delayed any big purchases due to the pandemic (e.g. vehicle, vacation/trips, home appliances, home furnishings, electronics, etc.)?

All residents (n=500)



Delayed big purchases due to the COVID-19 Pandemic, by age

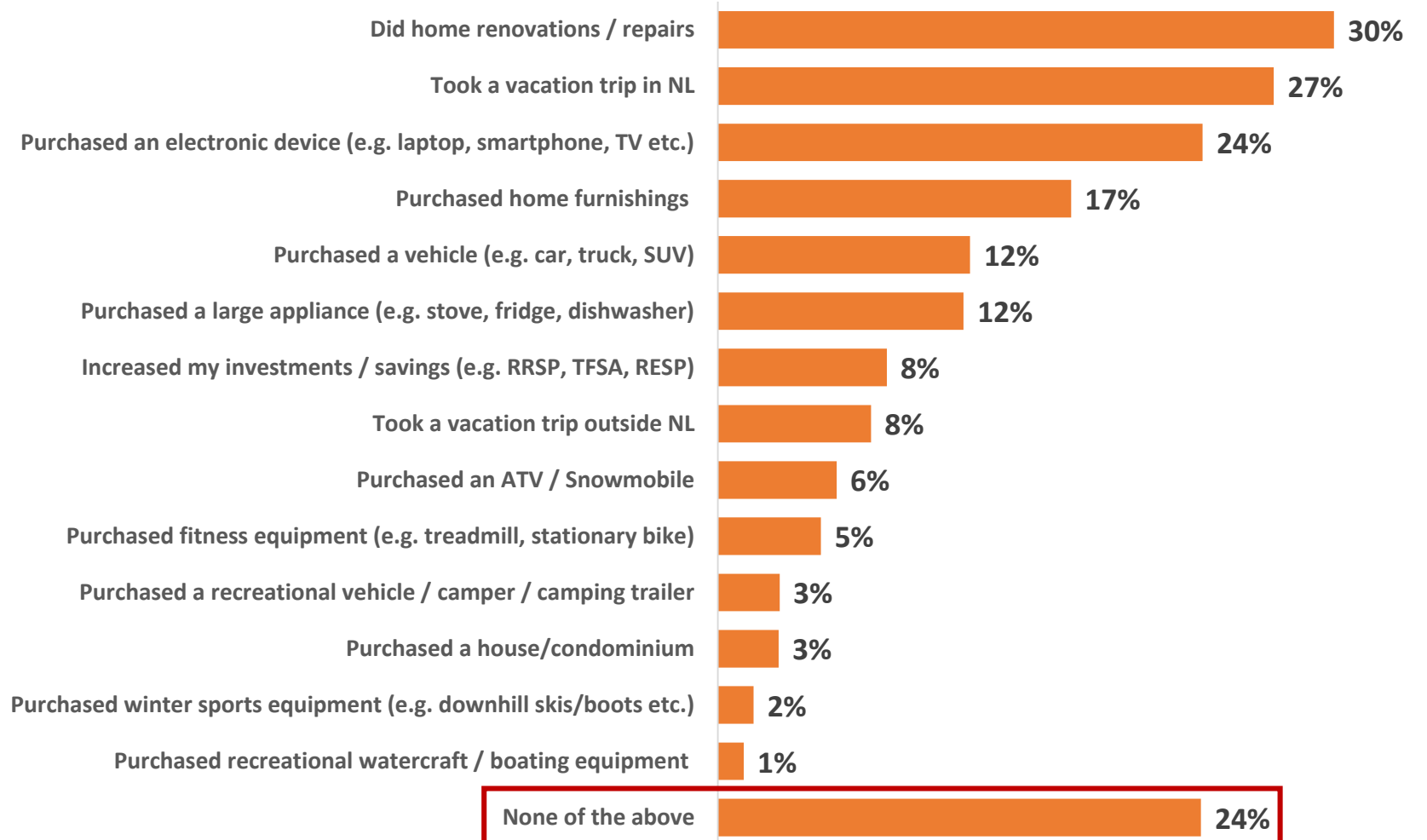


- Despite a seemingly small impact on household finances of the COVID-19 pandemic on the majority of NL residents, over half (54%) reported that they delayed big purchases such as vehicles, vacations or home appliances
- While the vast majority of those feeling a big/dramatic impact of the pandemic on their finances delayed big purchases, nearly 60% of those feeling a small impact also delayed such purchases
- In line with the greater financial impact on younger residents, residents aged 18-34 are also the most likely to have delayed big purchases, with 68% doing so. This compares to just half of the other age groups who delayed big purchases since the start of the pandemic

Financial Impact of COVID-19

Have you done any of the following since the start of the pandemic (March 2020)?

All residents (n=500)



- In terms of big purchases residents made since the start of the pandemic, home renovations/repairs received the top mention, with 30% of residents doing so. 22% of these home renovators did so under the province's Residential Construction Rebate Program
- About one quarter each of residents took a vacation in NL and purchased electronic devices while 17% bought home furnishings
- 24% of residents did not make any of these purchases, with older residents aged 55+ the most likely not making any of these purchases (30%). This compares to 13% among those aged 18-34
- There seems to be a disconnect between the financial impact of the pandemic on those 18-34 year old residents and their likelihood to have made big ticket purchases

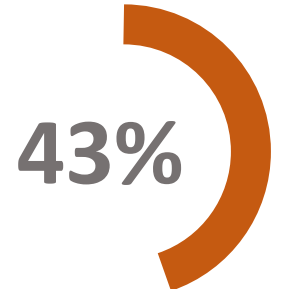
Summer and Fall Travel

Did you take an overnight pleasure trip between June and October 2020?

All residents (n=500)



In-province



In Maritimes



Other destinations



- During the June to October 2020 period, 47% of NL residents took an overnight pleasure trip
- Residents mostly travelled in-province, with 43% doing so
- Only 8% of residents travelled to the Maritimes
- At 5%, an even smaller share of NL residents travelled to other destinations outside the Atlantic bubble

Summer and Fall Travel

Did you take an overnight pleasure trip between June and October 2020?

By Age

	All residents	18-34	35-54	55+
Sample size	500	85	153	258
Overnight trip	47%	48%	50%	45%
Overnight trip in NL	43%	39%	49%	41%
Overnight trip to Maritimes	8%	11%	8%	8%
Overnight trip to other destinations	5%	13%	2%	4%

By Region of Residence

	All residents	St. John's	Other Eastern	Central	Western/Labrador
Sample size	500	214	115	82	89
Overnight trip	47%	47%	41%	51%	51%
Overnight trip in NL	43%	42%	35%	46%	49%
Overnight trip to Maritimes	8%	12%	4%	4%	10%
Overnight trip to other destinations	5%	4%	5%	4%	7%

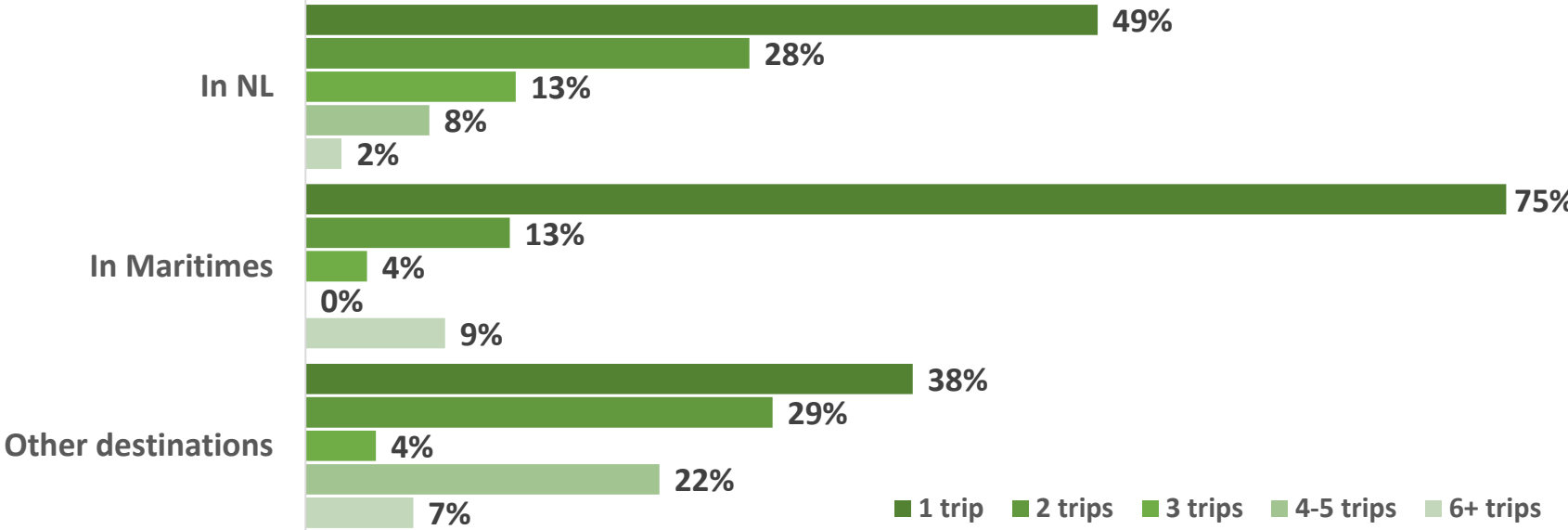
- Travel incidence and rates of travel within the province, travel to the Maritimes and to other destinations were similar across all age groups
- Residents aged 18-34 were significantly more likely to take an overnight trip to other destinations outside the Atlantic bubble
- Residents of all regions were equally likely to take an overnight trip, however, residents of the Eastern region were significantly less likely to take an in-province trip than residents of other regions
- Residents of St. John's were significantly more likely to take an overnight trip to the Maritimes than residents of other eastern and central regions

Summer and Fall Travel

Overnight pleasure trips taken between June and October 2020

By Destination (In NL n=214; In Maritimes n=39; Other destinations n=22*)*

**Caution! Small sample*



Average **2.0** trips taken in-province



Average **1.7** trips taken to the Maritimes

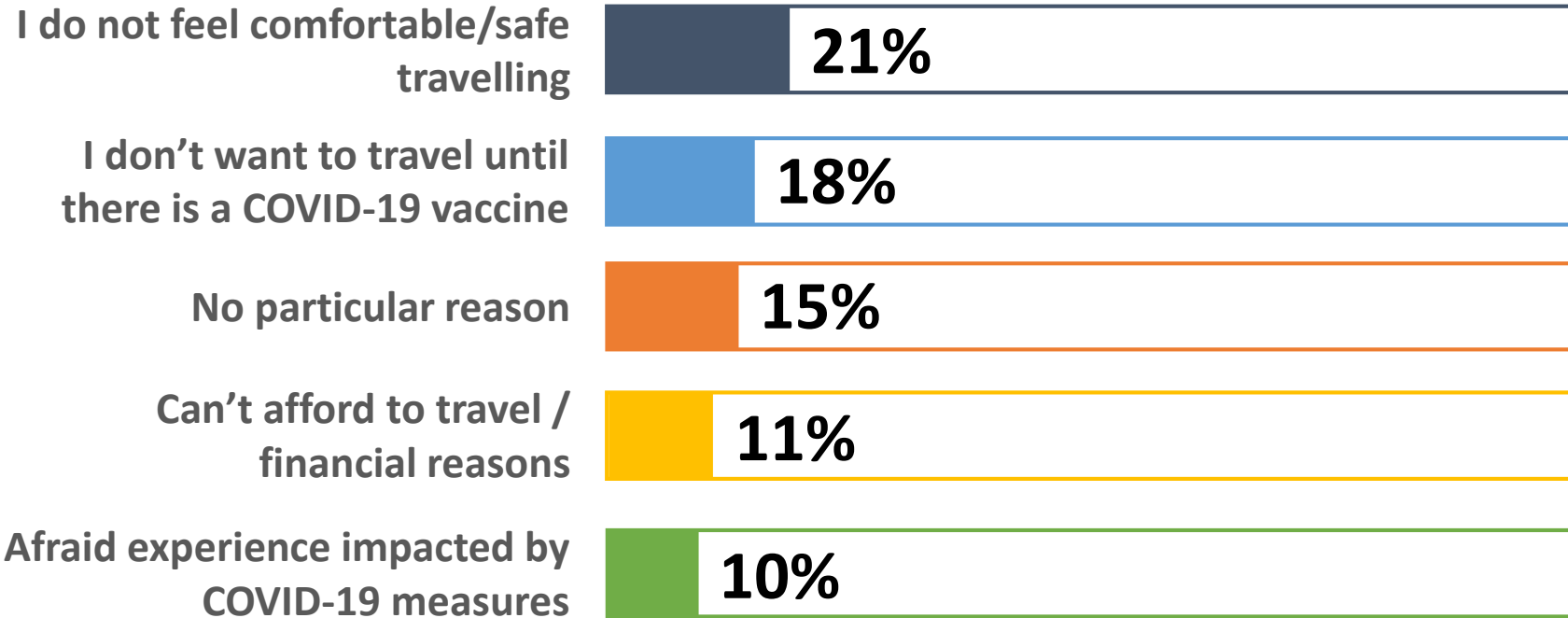


Average **2.7** trips taken to other destinations

- Nearly half NL residents (49%) who travelled in-province made just one trip while another 28% made two trips. Only one in ten residents took more than three trips in the province
- 75% of residents who travelled to the Maritimes took just one trip there, with another 13% taking two trips
- While two thirds of residents who travelled outside the Atlantic bubble took one or two trips there, the share of those taking 4 or more trips is relatively high at 29%
- Residents who travelled in-province took an average of 2.0 trips in the province; those travelling to the Maritimes took 1.7 trips there and those travelling outside the bubble took 2.7 trips to other destinations

Barriers to Summer/Fall Travel in NL

Reasons for not taking overnight pleasure trips in NL between June and October 2020 Residents who did not take a trip in NL (n=278)



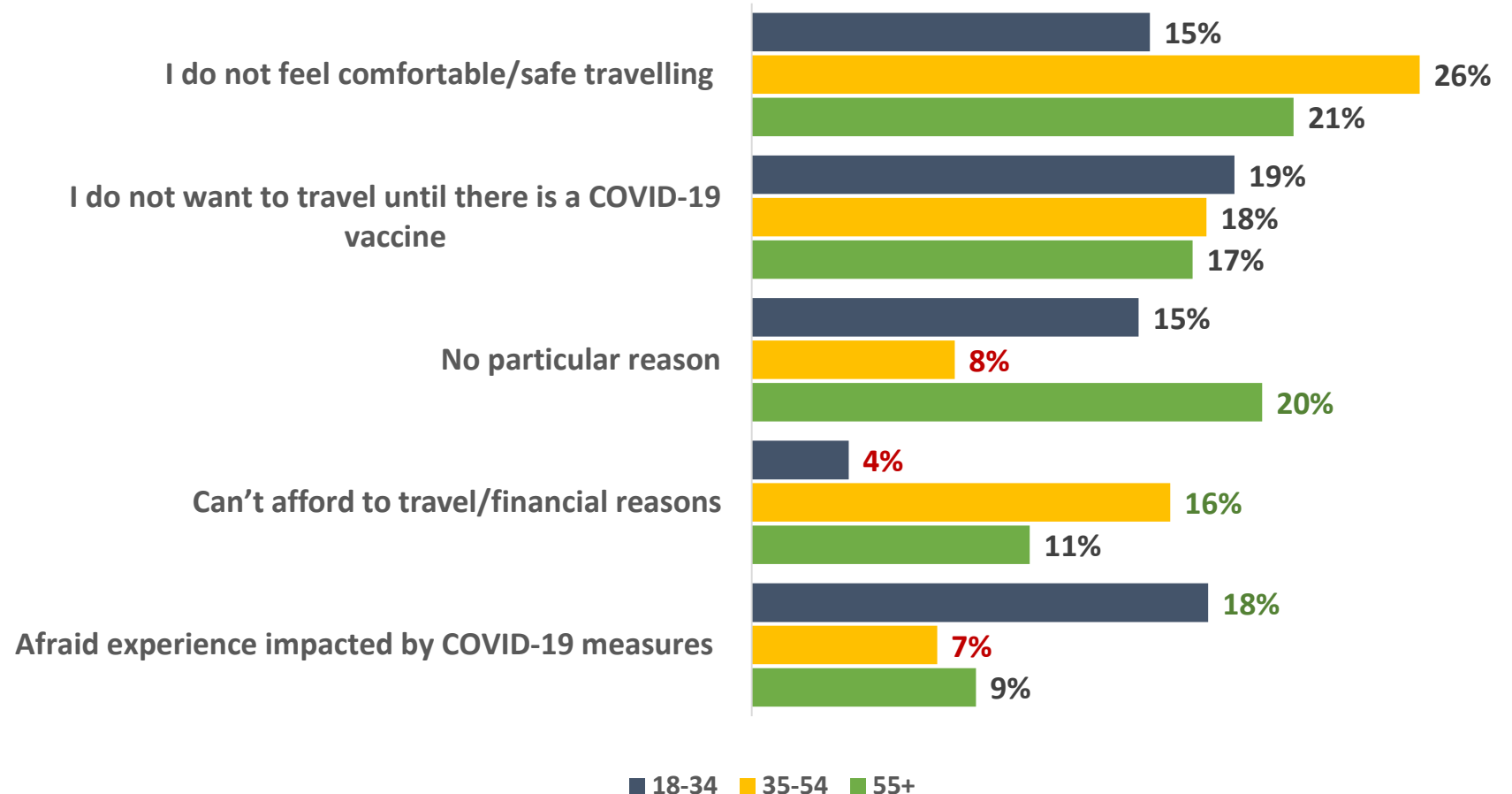
Additional reasons:

- Too expensive / high cost 7%
- Have other priorities 6%
- Too busy/no time/no vacation time 6%
- Personal reasons (e.g. illness, family) 4%

- While residents didn't take an overnight pleasure trip in this province for a variety of reasons, it was mostly the COVID-19 pandemic which curbed enthusiasm to travel at home, with one in five not feeling comfortable or safe travelling during the pandemic and another 18% saying they don't want to travel until there is a vaccine
- Interestingly, 15% of residents did not have any particular reason to not take a trip in their home province while 11% cited financial reasons
- One in ten residents didn't take a trip in NL as they were afraid the COVID-19 health and safety measures would impact their trip experiences

Barriers to Summer/Fall Travel in NL

Top reasons for not taking overnight pleasure trips in NL between June and October 2020 By Age, Residents who did not take a trip in NL (18-34 n=48, 35-54 n=76, 55+ n=152)



- While the top COVID-19 related reasons for not taking a trip at home this year apply similarly to all age groups among residents, other reasons do vary by age
- Interestingly, 20% of residents aged 55+ cited no particular reason for not travelling, significantly higher than among those aged 35-54 (8%) who cited this reason
- Those aged 35-54 were much more likely not to travel for financial reasons than those aged 18-34
- Of all age groups, younger residents aged 18-34 were the most afraid that their experience would be impacted by COVID-19 health and safety measures and didn't travel in the province because of that

NL Summer/Fall Travel Destinations

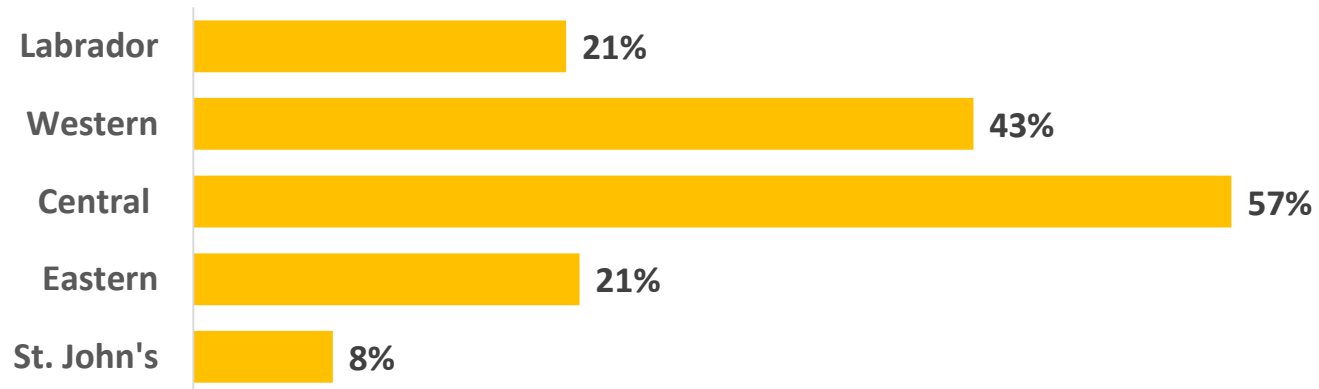
Primary destinations and nights spent of overnight pleasure trips taken in NL between June and October 2020

Residents who took overnight pleasure trips in NL (n=214)

Region of Visit	Share of Residents Visiting	Share of Trips	Share of Nights	Average Length of Stay
Central	55%	29%	33%	4.6 nights
St. John's/NE Avalon	42%	22%	17%	3.1 nights
Western	29%	15%	21%	5.5 nights
Eastern	23%	12%	8%	2.7 nights
Other Avalon	9%	5%	6%	5.1 nights
Labrador	2%	1%	3%	12.3 nights

*Share of regional residents who travelled in their own region**

***Caution! Results based on some small samples**



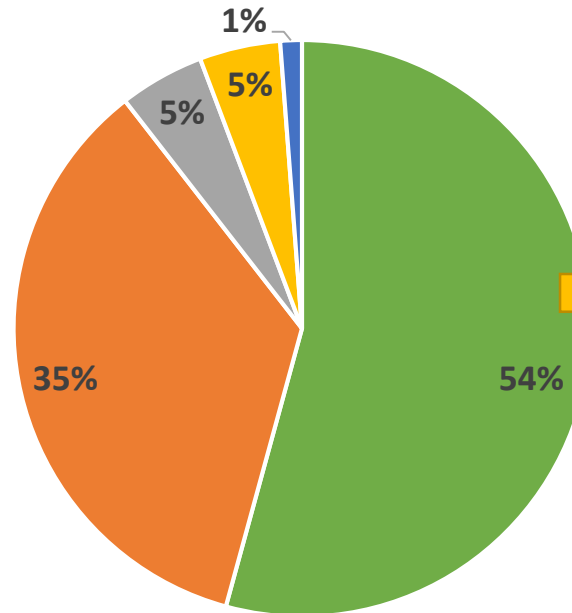
Read: 57% of Central region residents took overnight pleasure trips with a primary destination in the Central region

- During summer and fall 2020, residents travelled to all regions of the province, with Central being the most popular
- With the exception of residents of the Eastern region, Central was the top destination among residents of all other regions, especially among St. John's residents, 63% of whom visited Central
- 55% of residents visited the Central region, taking 29% of all reported trips there and spending 33% of all reported nights in that region
- 42% of residents travelled to St. John's, with trips there accounting for 22% of all trips and nights spent for 17% of all nights reported
- Length of stay varied by region visited, with Labrador visits lasting the longest at 12.3 nights. Overall trip length was 3.9 nights

NL Summer/Fall Travel

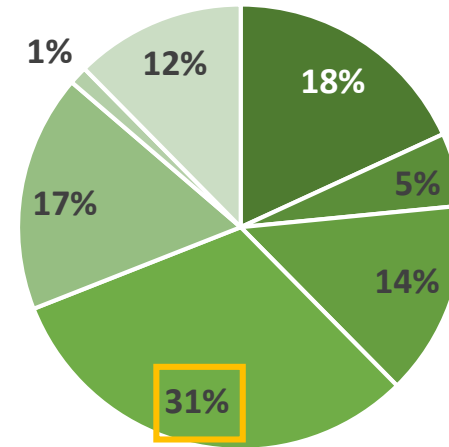
Main purpose of overnight pleasure trips taken in NL between June and October 2020

Overnight pleasure trips in NL



- Vacation
- Visiting relatives or friends
- Special event or occasion
- Other
- Don't know/unsure

Destinations of summer / fall vacation trips in NL



- St. John's / NE Avalon
- Other Avalon
- Eastern
- Central
- Western
- Labrador
- No info

27%
of NL residents visited a destination for the *first time*

Popular first-time destinations

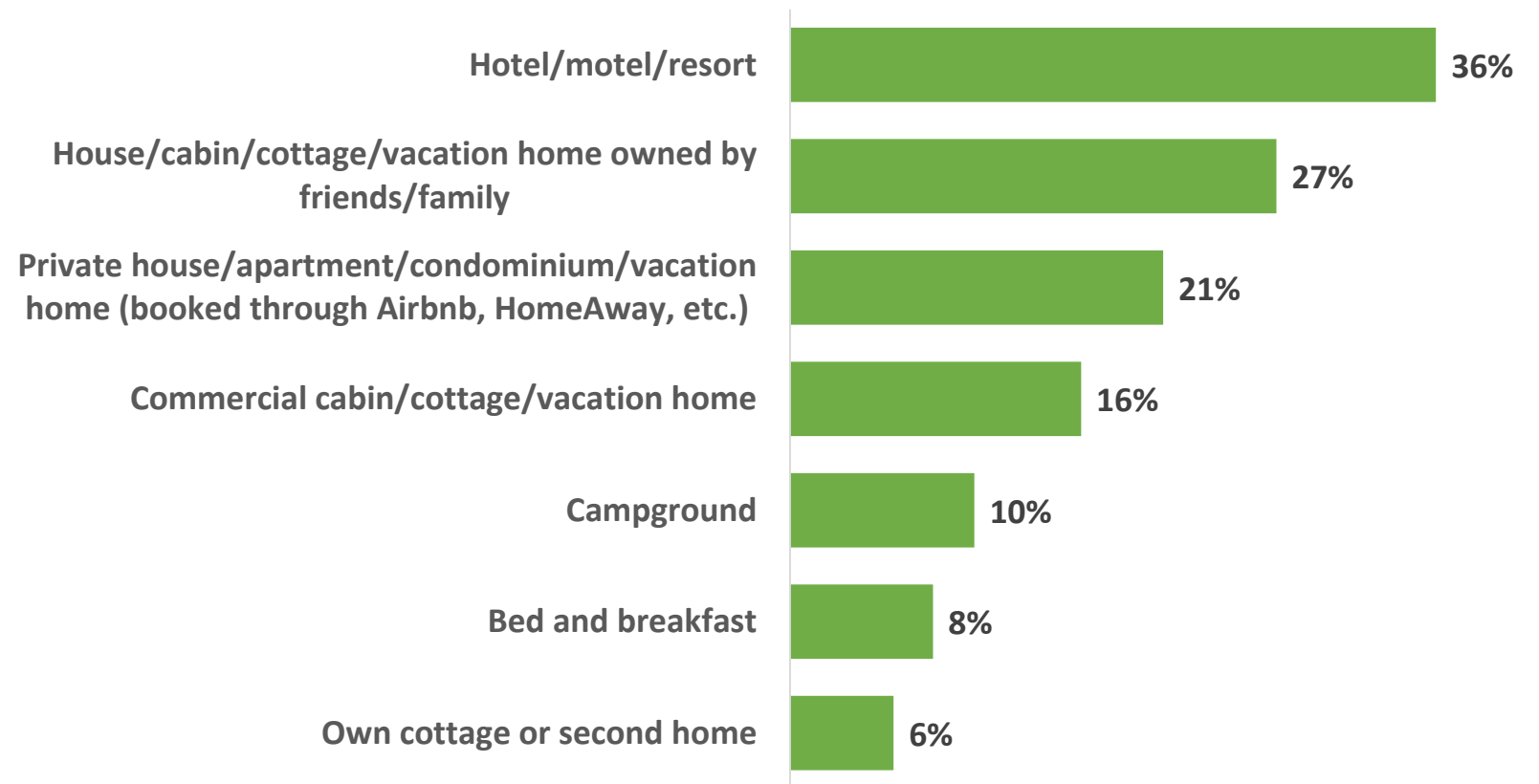
- Bonavista Peninsula
- Gros Morne
- King's Point
- Fogo Island
- Twillingate

- The majority of trips (54%) residents took this summer and fall were for vacation purposes, with some residents taking more than one vacation trip in the province
- 35% of trips taken were to visit relatives or friends while 5% were for a special event or occasion (wedding, anniversary, birthday)
- The Central region was the most popular vacation destination, accounting for almost one third (31%) of all vacation trips, by far the highest share of any region
- At 18% and 17% respectively, residents made a similar share of vacation trips to St. John's/NE Avalon and the Western region
- Residents of St. John's and the Eastern region were the most likely to have visited a destination for the first time

NL Summer/Fall Travel

Accommodations used during overnight pleasure trips taken in NL between June and October 2020

Residents who took overnight pleasure trips in NL (n=214)

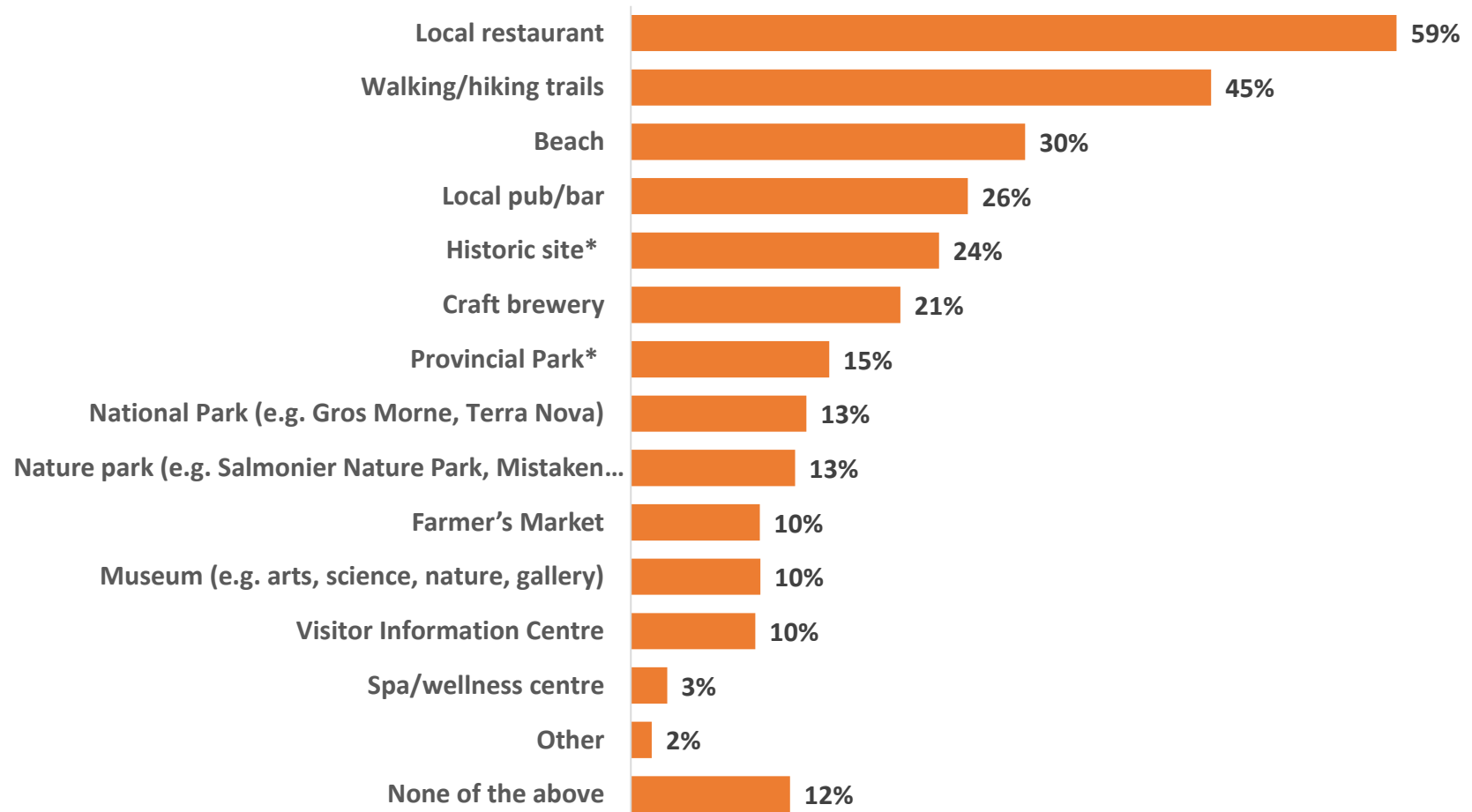


- Residents used a variety of accommodations during their overnight trips this summer and fall, with hotels/motels/resorts being the most popular, with over one third of residents (36%) staying there
- More than one quarter of residents (27%) stayed at a place owned by family or friends during their trips
- One in 5 residents used accommodations booked through a short-term rental platform
- Most older residents aged 55+ (42%) stayed at hotels or resorts and were less likely to camp or use B&Bs than residents of other ages

NL Summer/Fall Travel

Places and attractions visited during overnight pleasure trips taken in NL between June and October 2020

Residents who took overnight pleasure trips in NL (n=214)



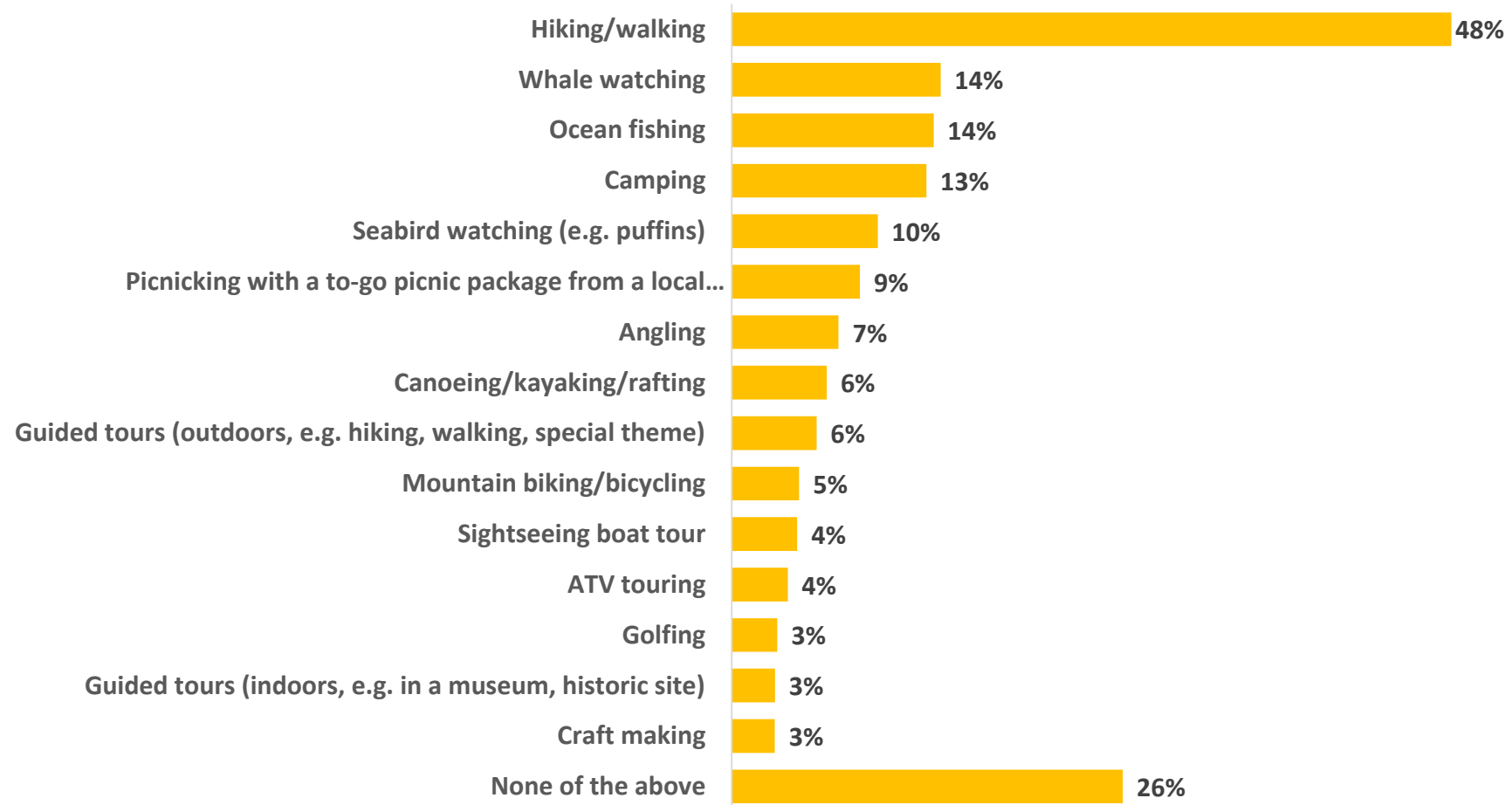
*Specific examples provided during survey

- 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 – 45%, went on walking/hiking trails while 30% visited a beach and 26% went to a local pub or bar
- Residents were more than twice as likely to visit historic sites (24%) than they were to visit museums (10%)
- Craft breweries were also popular, with 1 in 5 residents visiting one during their trips while only 10% went to a Farmer's Market
- Just over 1 in 10 residents each visited Provincial (15%) or National Parks (13%)

NL Summer/Fall Travel

Participation in activities during overnight pleasure trips taken in NL between June and October 2020

Residents who took overnight pleasure trips in NL (n=214)



- While nearly half of residents 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
- Participation rates in activities were generally highest among the younger age groups and very low among residents aged 55+
- While residents of St. John's were the most likely to participate in many activities, residents of Central were the least likely

NL Summer/Fall Travel

Most memorable experiences during overnight pleasure trips taken in NL between June and October 2020

Residents who took overnight pleasure trips in NL (n=214)



Spending time with family and friends



Visiting specific places, attractions



Beauty of the province, nature, scenery



Based on this year's travel experience in NL,

92%

of residents would consider taking an overnight pleasure trip again in 2021

- While residents reported a great variety of most memorable experiences, they enjoyed spending time with family and friends more than anything else
- A number of residents found certain place or attraction visits most memorable, e.g. history in Bonavista, the Boyd's Cove historic site, Salmonier Nature Park, the Seamen's Museum in Grand Bank, exploring Fogo or climbing Gros Morne Mountain
- Nearly as many residents marveled at the province's beauty and amazing scenery
- Many a resident's memorable moments are also associated with local eating places and the food they offered

Stay Home Year 2020 Campaign

Awareness and influence of the province's Stay Home Year 2020 tourism marketing campaign

Residents who took overnight pleasure trips in NL (n=214)

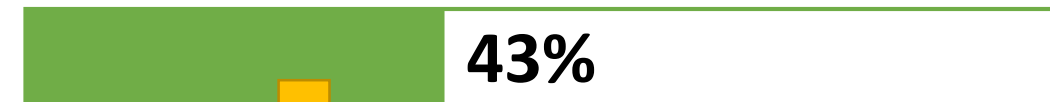
Residents who took overnight pleasure trips in NL in 2020 who were aware of the tourism marketing campaign



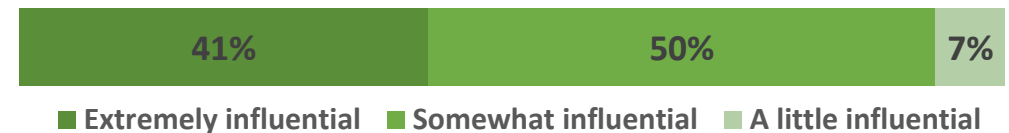
Existence of firm travel plans among residents when becoming aware of the campaign



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



- On June 24, the province launched its *Stay Home Year 2020* tourism marketing campaign to encourage residents to spend their vacation at home in 2020
- Among those who did travel at home, the campaign showed very high awareness levels, with 89% of residents saying they were aware of the campaign
- Of those residents aware of the campaign, 46% already had firm plans to take an in-province trip at the time they became aware
- 43% of residents aware of the campaign said they were influenced by the campaign to take an overnight pleasure trip at home, with 41% of those residents indicating that they were extremely influenced by the campaign

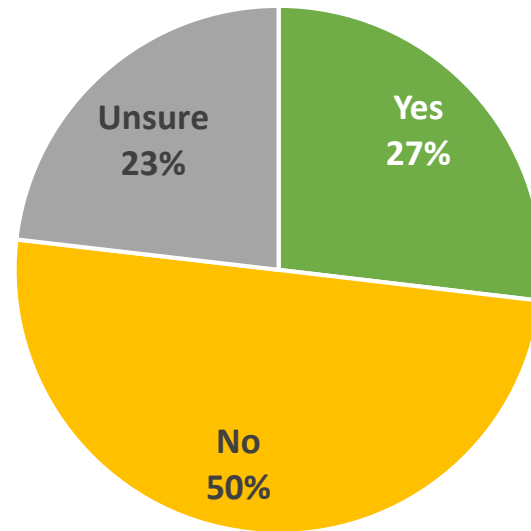
WINTER TRAVEL PLANS
(December 2020 to March 2021)

2020 – 2021 Winter Travel in NL

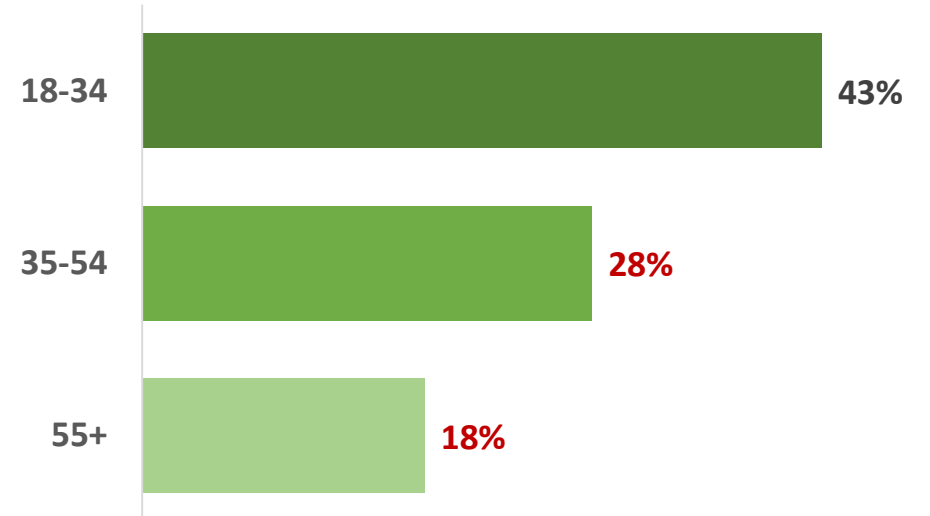
Plans to take overnight pleasure trips during the winter (December 2020 to March 2021)

All residents (n=500)

Residents planning to take overnight pleasure trips in NL this winter



Residents planning to take overnight pleasure trips in NL this winter, by age



NL Residents planning trips to other destinations

10%

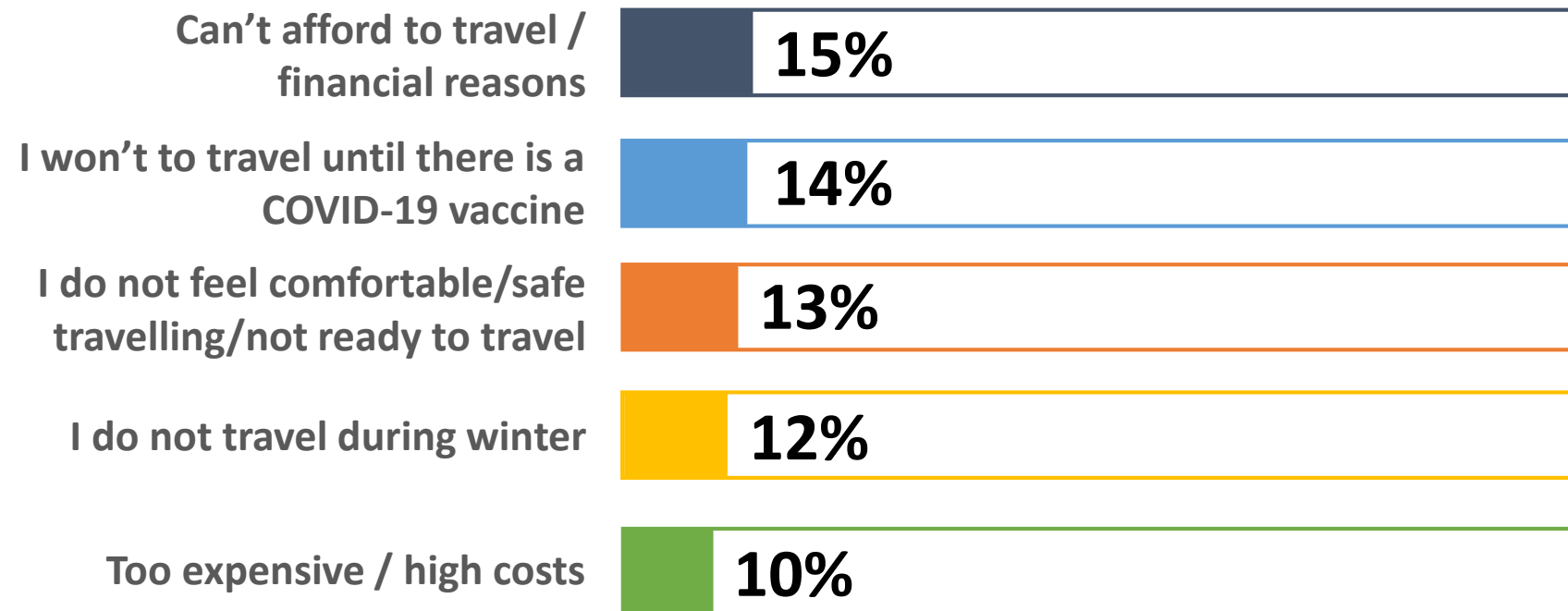
NL Residents not planning any trips this winter

56%

- When it comes to taking a trip in NL this winter, residents are not very enthusiastic at the moment, with only 27% indicating that they are planning a trip between December and March
- Half of NL residents currently do not have any plans to take an overnight trip in the province during the winter
- Plans for winter trips differ significantly by age, with 43% of those aged 18-34 planning one. This compares to only 28% of those aged 35-54 and 18% among those aged 55+
- Overall, 56% of residents have no plans to take a trip this winter, while 10% do have plans to travel to other destinations, mostly to Nova Scotia and a small share to Ontario and Alberta

Barriers to Winter Travel in NL

Reasons for not taking overnight pleasure trips in NL this winter (December 2020 to March 2021) Residents who do not plan to take a trip in NL (n=251)



Additional reasons:

- No particular reason 9%
- Too busy/no time/no vacation time 7%
- Usually travel to sun/beach destinations but will not travel due to the pandemic 7%

- Residents won't take an overnight pleasure trip in this province this winter for a number of reasons, with most top reasons affecting residents at similar levels
- While financial reasons/affordability top the list, the COVID-19 pandemic continues to impact travel at home, with more than one in ten respectively wanting to see a vaccine before they travel or not feeling comfortable or safe travelling during the pandemic
- There is also a share of residents who simply do not travel during winter or who would normally take trips to sun destinations
- A similar share of residents find it too expensive to take an overnight trip in the province

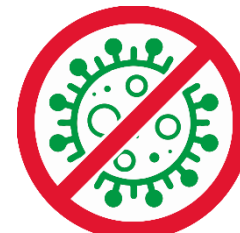
Winter Travel in NL

Motivators for taking overnight pleasure trips in NL during the winter (December 2020 to March 2021)

Residents who do not plan or are unsure whether to take a trip in NL during the winter (n=371)



13%
Nothing



9%
COVID vaccine/cure



7%
Personal finances



6%
Weather



5%
Costs/affordability

- In addition to relatively low interest in winter travel, residents also appear to be at a loss about what could motivate them to take a trip this winter at home: more than half of those currently not planning a winter trip are unsure as to what would make them change their minds
- In addition, 13% of residents feel that there is nothing that would motivate them to take a winter trip at home
- While just under one in ten could be on the go if there were a COVID-19 vaccine or cure, a small share of residents feel that improved personal finances and lower travel costs could sway them to take a trip this winter

Winter Travel in NL

Main purpose for taking overnight pleasure trips in NL during the winter (December 2020 to March 2021)

Residents planning to take a trip in NL during the winter (n=129)



Vacation

25%



**Visiting relatives/
friends**

36%



**Weekend
Getaway**

30%

Reasons for taking a winter vacation trip in Newfoundland and Labrador

*Closer to home, convenient location
Cheaper than travelling outside [NL]
To get away, take a break*

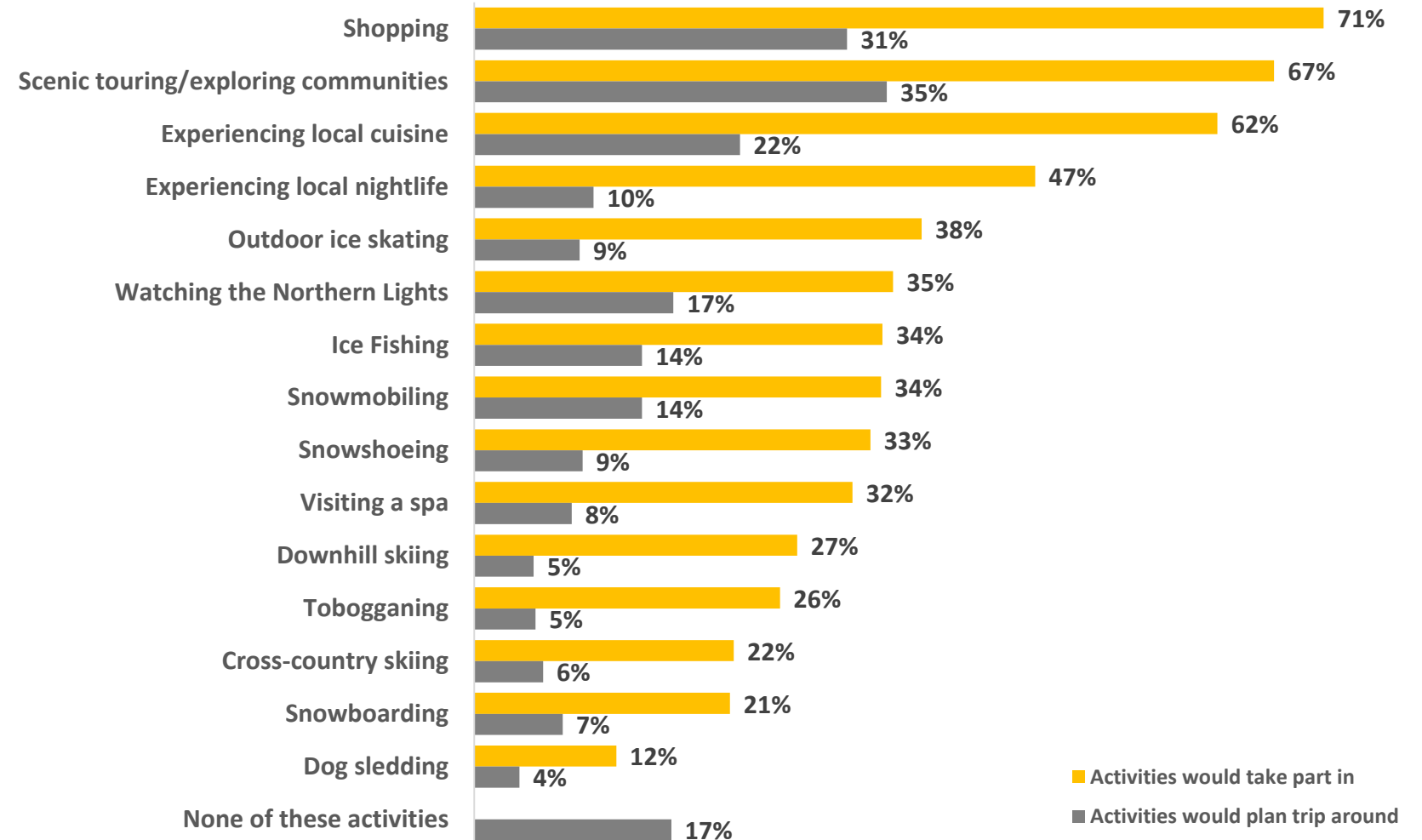
*Never skied in NL before, good time to do it
Good time to go skiing again after a long time
Have time off work*

- Just over a third of residents who plan to take an in-province trip this winter will do so to visit relatives or friends while 30% are looking for a weekend getaway
- One quarter of those planning to take a winter trip would go on a vacation trip while 6% would take a trip for a special occasion
- At 34%, residents aged 18-34 are significantly more likely to take a vacation trip this winter than those aged 55+ at only 12%
- At 50%, residents aged 55+, on the other hand, are the most likely to take a winter trip to visit family or friends while residents of all ages are equally likely to go on a weekend getaway trip in the province this winter

Winter Travel in NL

Participation in activities during overnight pleasure trips in NL during the winter (December 2020 to March 2021)

Residents planning to take a trip in NL during the winter (n=129)

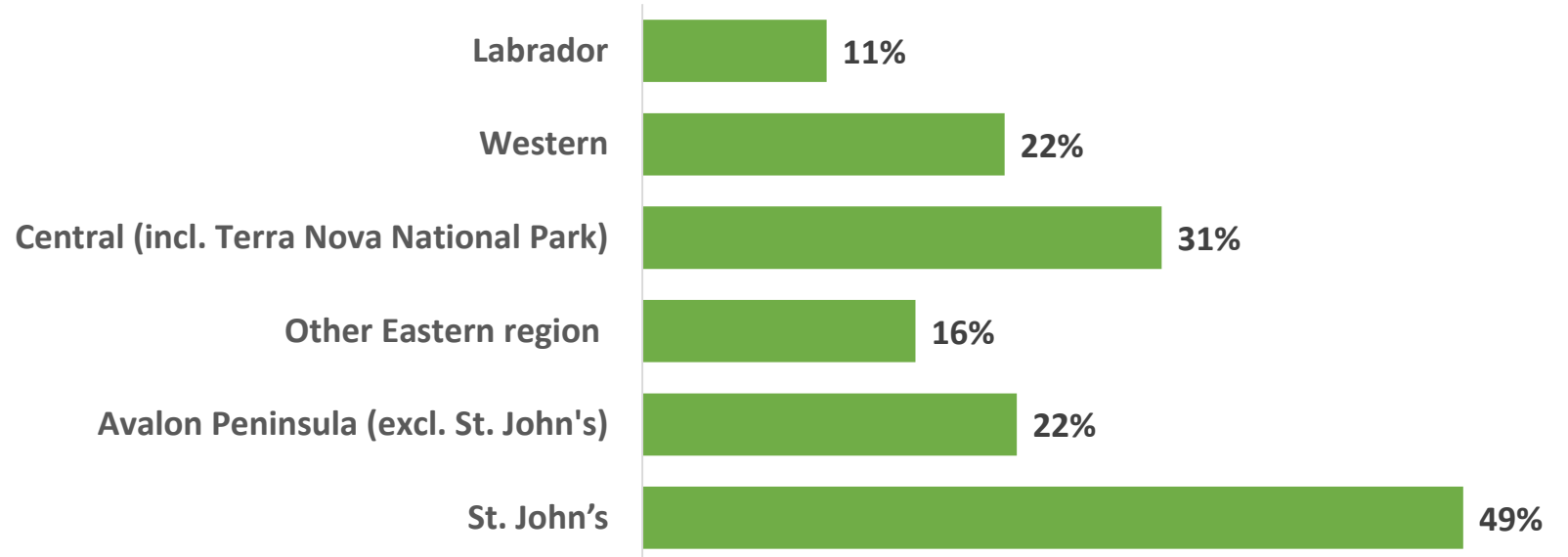


- Among residents planning a winter trip in the province, there is more interest to participate in general activities such as shopping, scenic touring and local cuisine than in snow-based/outdoor activities
- Top snow-based/outdoor activities residents would take part in include outdoor ice skating, watching Northern Lights, snowmobiling and snowshoeing
- Trips are also more likely to be planned around general activities than snow-based/outdoor activities
- Participation levels for almost all the activities are driven by residents aged 18-34 while residents aged 55+ generally show low levels of interest to participate in any of the activities

Winter Travel in NL

Regions residents plan to visit during overnight pleasure trips in NL during the winter (December 2020 to March 2021)

Residents planning to take a trip in NL during the winter (n=129)

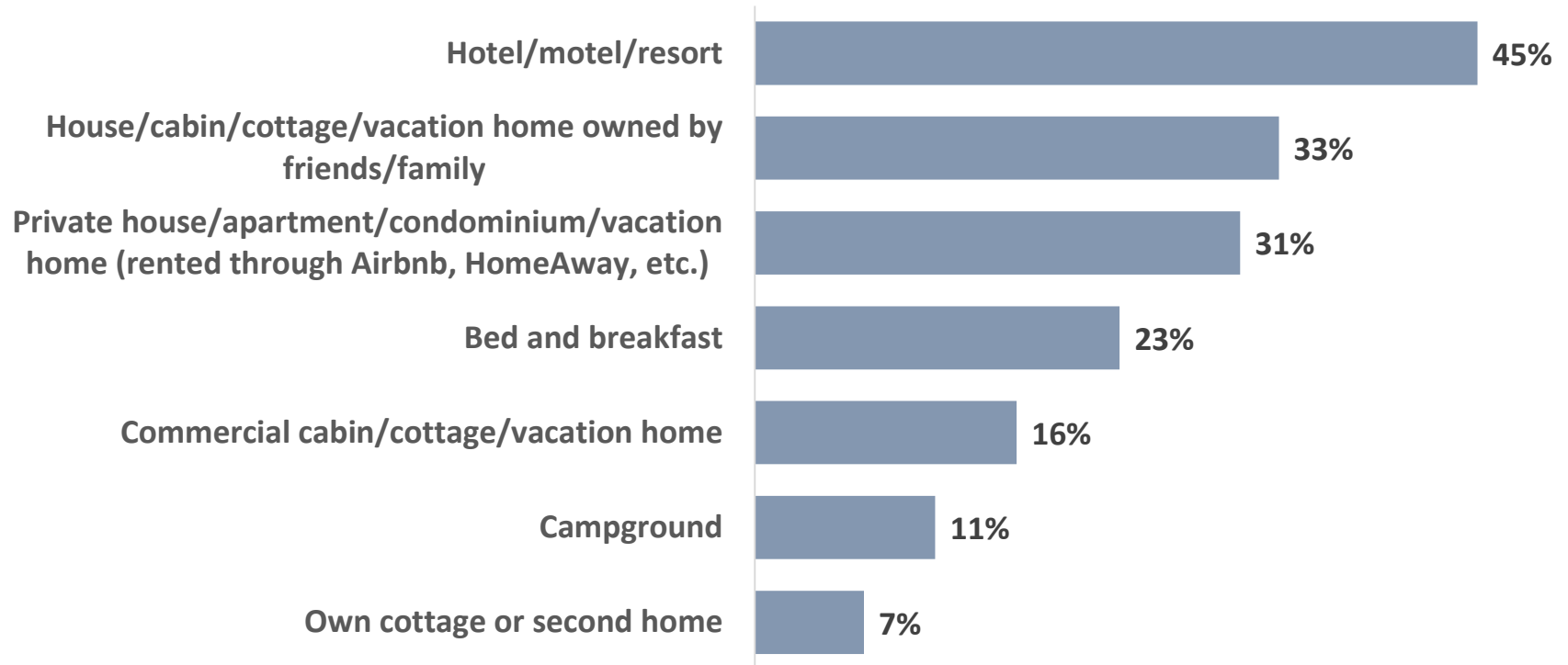


- Top destinations among those residents planning to take a trip this winter include St. John's and the Central region, with nearly half of residents planning a trip to St. John's and 31% planning to visit the Central region
- About one in five residents each are planning to visit the Avalon Peninsula and the Western region
- While St. John's is the top choice as a winter trip destination for residents of all ages, residents aged 35-54 are significantly more likely to visit the Western region than residents of other ages

Winter Travel in NL

Accommodations residents plan to use during overnight pleasure trips in NL during the winter (December 2020 to March 2021)

Residents planning to take a trip in NL during the winter (n=129)



- Residents who are planning a trip in NL this winter would stay in a variety of accommodations, with almost half (45%) planning to stay at a hotel, motel or resort
- Staying with family or friends (33%) is equally as popular as using accommodations booked through a short-term rental platform (31%) while nearly a quarter of residents (23%) would stay at a B&B
- While residents aged 35-54 would overwhelmingly stay at a hotel/resort (61%), most younger residents would favour accommodations booked through a short-term rental platform (37%)
- The largest share of residents aged 55+ would stay at a hotel/resort (41%) or with family/friends (40%)

Winter Travel in NL

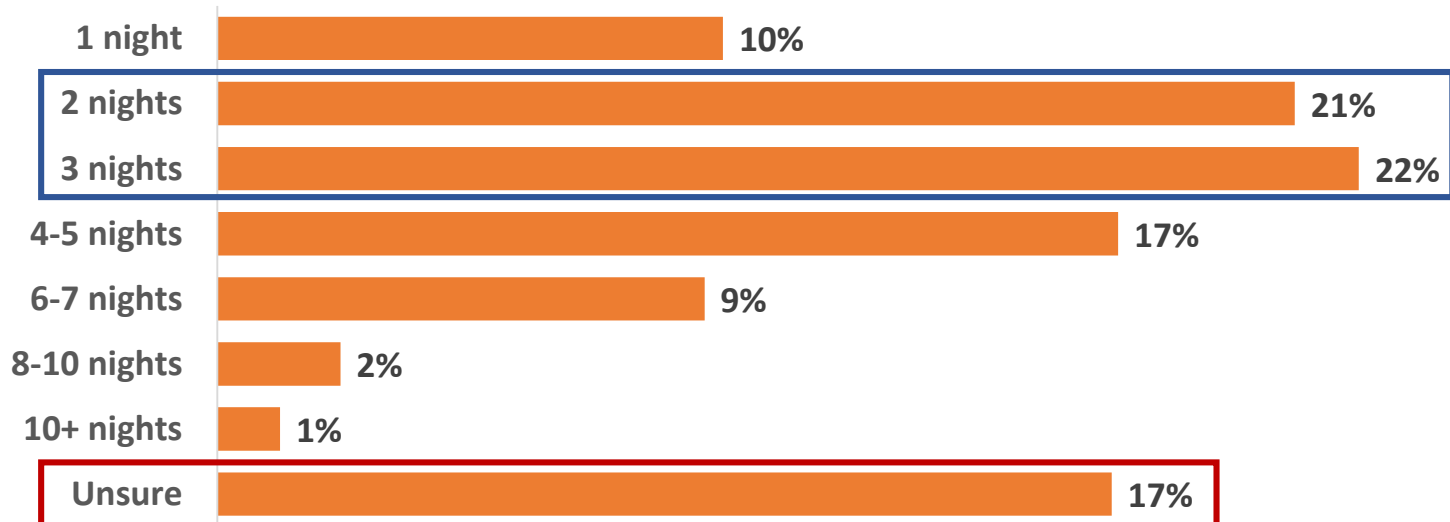
Month residents plan to take overnight pleasure trips in NL during the winter (December 2020 to March 2021)

Residents planning to take a trip in NL during the winter (n=129)



Number of nights residents plan to spend on overnight pleasure trips in NL during the winter (December 2020 to March 2021)

Residents planning to take a trip in NL during the winter (n=129)



- Residents' most favoured months for a trip this winter are December (34%) and February (28%)
- While winter trips in December are mostly for the purpose of visiting relatives and friends, most trips planned for February are for vacation or weekend getaways
- While a little less popular for winter travel, trips in January are equally likely to happen for vacation or to visit relatives and friends while weekend getaways dominate as trip purpose in March
- In line with the popularity of weekend getaways, most residents are planning trips of 2 or 3 nights, with very few residents planning trips that are longer than a week
- The average trip length of residents' planned winter trips is 3.6 nights

Summary and Recommendations

Financial Impact of COVID-19 on NL Households

- The majority of residents said that the COVID-19 pandemic has had little impact on their personal or household finances. Only 26% of residents overall reported a big or dramatic impact on their finances, with those in the millennial age bracket and residents of the Central region more likely to report such a significant impact
- Over half of residents said they have delayed making big purchases such as vehicles, vacations or home appliances. While this is especially true of those who report a dramatic impact on personal finances during the pandemic, the majority of those feeling only a small financial impact from the pandemic have also delayed such purchases. This suggests that residents, regardless of their financial situation, are hesitant to make big decisions, purchases, or plans amidst the continued uncertainty of the pandemic

Summer and Fall Travel in NL

- **Summer and Fall Travel:** Forty-three percent of NL residents took an overnight pleasure trip within the province between June and October 2020, averaging 2 in-province trips during this period. Only 8% took an overnight trip to the Maritimes. For those residents who did not take an overnight trip this summer or fall, not feeling comfortable travelling during the pandemic or until there is a vaccine were top reasons
- **Top In-province Destinations:** For residents who travelled within Newfoundland and Labrador, the Central region was the most popular destination. St. John's / Northeast Avalon area was also a top destination. Over one quarter of residents reported visiting an in-province destination for the first time
- **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, pubs, historic sites, and craft breweries while participation in specific activities remained generally low with exception of hiking and walking

Summary and Recommendations

- **Most Memorable Moments:** The most memorable moments of residents' trips included spending time with family and friends, visiting specific places and attractions, experiencing the province's nature, scenery and restaurants. Based on this year's travel experiences, the vast majority of NL residents (92%) who travelled in-province this summer and fall said they would consider taking an overnight pleasure trip within NL again in 2021

Stay Home Year 2020 Campaign Impact

- Nearly 9 in 10 residents were aware of the *Stay Home Year 2020* tourism campaign and 43% of those aware of the campaign said it influenced them to take an overnight trip within NL. Half of those who said the campaign influenced them to travel within the province said it was 'somewhat influential' while 41% said it was 'extremely influential' to their decision

2020-2021 Winter Travel Intentions

- **Winter Travel Intentions:** Just over one quarter of residents are planning an overnight pleasure trip within NL between December 2020 and March 2021. Half of residents currently do not have any plans to travel in-province in this timeframe. Those in the millennial age bracket (18-34) are significantly more likely to be planning a trip compared to those residents aged 55 and older. Those planning a winter trip mostly intend to visit friends and family or take a weekend getaway.
- **Winter Trip Timing:** Residents' most favoured months for a trip this winter are December and February. Those planning December trips are more likely to be visiting friends and family, while trips planned for February are for vacation or weekend getaways. Most residents are planning trips of 2 or 3 nights.

Summary and Recommendations

- **Top Reasons for Not Travelling:** Those not planning to travel this winter within the province cite financial reasons and concerns around COVID-19 as top reasons, with some residents indicating they simply do not care for winter travel. Residents appear quite ambivalent towards winter travel within the province - more than half of those currently not planning a winter trip say they are unsure as to what would motivate them to travel in-province, with another 13% saying that nothing would motivate them to take a winter trip within the province
- **Top Activities:** For those residents planning an in-province winter trip, general activities like shopping, scenic touring, and local cuisine and nightlife are top activities. Top snow-based activities for these residents include ice skating, watching the Northern Lights, ice fishing, snowmobiling, snowshoeing, downhill skiing and tobogganing. Residents in the millennial age group are much more likely to intend to participate in nearly all types of activities, with those aged 55+ showing relatively low levels of interest in most activities
- **Top Destinations for Winter Trips:** On a regional basis, top destinations for residents planning a winter trip within NL include the St. John's area and the Central region. Notably, residents aged 35-54 are significantly more likely than other age groups to plan to visit the Western region
- **Accommodations:** Almost half of those planning in-province winter trips intend to stay at a hotel, motel or resort. One third plan to stay with friends or family, while 31% say they would book through a short-term rental platform and just under one quarter would stay at a B&B. Residents aged 35 and older tend to prefer to stay at hotels/resorts and with friends and family, while younger residents favour accommodations booked through short-term rental platforms

Summary and Recommendations

Recommendations

- **Winter Travel 1:** among residents, millennials (18-34) are the most likely to travel, are planning to travel for vacation and are the most interested in a variety of general and snow-based activities. This group of potential winter travellers could be targeted with vacation offers / deals that appeal to their budget limits as they are also the most impacted financially by the pandemic
- **Winter Travel 2:** all residents planning to travel this winter show similar levels of interest in weekend getaways. Offers emphasizing shopping, local restaurants and nightlife as well as exploring, combined with opportunities for some snow-based experiences for younger residents would likely appeal to a larger share of residents
- **Winter Travel 3:** while older residents (55+) appear to be more likely to travel this winter to visit relatives and friends, some are also planning weekend getaways. With higher levels of interest in shopping, local cuisine and exploring (relative to snow-based activities), this group of residents could also be targeted with offers which include these top activities while also emphasizing the opportunity to spend time with family and loved ones
- **Winter Travel 4:** the majority of residents does currently not plan to take overnight winter trips but there is no particular single reason that stands out for not doing so. While financial reasons and the pandemic do pose a barrier for travel in the province for some, survey results suggest there is an opportunity for educating residents on winter travel opportunities in their home province. With a majority at a loss as to what might motivate them to travel at home in the winter, showcasing winter travel opportunities in the province that include a variety of activities, emphasize winter fun and affordable experiences right at their doorstep might lure some residents with no current travel plans out the door

Summary and Recommendations

- **Summer/Fall Travel 1:** 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 visiting various attractions, sites and places, setting the stage for building on this momentum as nearly all residents (92%) who travelled in 2020 would do so again in 2021. This provides for an opportunity to build on 2020 experiences to entice more residents to vacation at home
- **Summer/Fall Travel 2:** as 2020 has shown, a fair share of residents has been discovering in-province destinations for the first time, including those that are also most popular with non-resident visitors (e.g. Bonavista peninsula, Gros Morne and Fogo Island). There is an opportunity to stimulate interest and attract more residents to discover something new in their home province as well as to showcase destinations and sites that may be considered 'hidden gems'
- **Summer/Fall Travel 3:** during their 2020 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 2021, packages and content featuring local food and drink opportunities along with nearby hiking trails, beaches, and historic sites may help encourage more residents to vacation in-province this summer/fall
- **Summer/Fall Travel 4:** as spending time with family and friends was the most memorable part of residents' 2020 summer/fall vacations 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 into summer/fall 2021