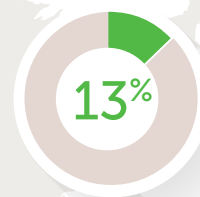


USA

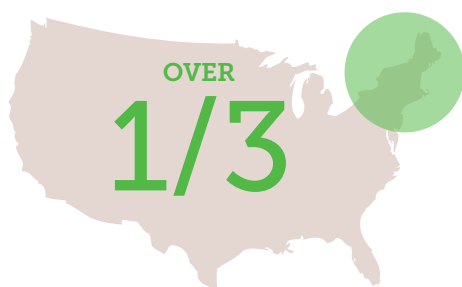
Vacation travellers from the USA are attracted to Newfoundland and Labrador by its nature and wildlife, seeking experiences in a destination they have always wanted to visit. More than any other market, this market is also interested in experiencing the province's hunting and fishing opportunities.

The US is NL's
second-largest
source market
after Canada,
accounting for



of all vacation visits

WHERE THEY COME FROM



of US vacationers are from the New England **18%** and Mid-Atlantic **17%** states, making these states key for NL within the US market, but visitors come from all corners of the US.

New York **9%**
Florida **8%**
Massachusetts **7%**

California **6%**
Pennsylvania **6%**

WHEN THEY VISIT

73% of US vacation visits occur from July to September



WHO THEY ARE

78% are over the age of 45
63% are 55+

95% have a post-secondary education

63% have a household income of >\$100,000

76% are first-time visitors

CHARACTERISTICS OF THEIR TRIP

While most American visitors travel to the province by air, the drive market is strong among US vacationers, with more travelling by car at **36%** compared to vacation visitors overall at **28%**

ARRIVE BY

36%

64%

72% of travellers stay in hotels/motels

46% travel as couples with no children

Average spend is
\$3,818

US vacationers stay
10 nights
on average

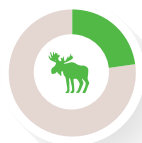
DESTINATION CANADA'S EXPLORER QUOTIENT

The Explorer Quotient provides tourism businesses with valuable insights into why and how different people like to travel. Going beyond traditional market research, it takes a deeper look at individuals' personal beliefs, social values, and worldviews. From this data, we glean why different types of travellers seek out entirely different travel experiences.

US travellers are primarily made up of Older Authentic Experiencers:

- Older couples and families – largely aged 55+.
- Well-educated empty nesters that work in (or retired from) white-collar careers.
- They tend to own their homes and earn above-average incomes.
- They plan their trips in advance – requesting literature prior to their trip and are more likely to visit in the summer months.
- Older Authentic Experiencers consume print media and TV at high rates and are receptive to outdoor advertisements. Although less engaged on social media, this group is comfortable with planning and booking travel online.

WHY THEY CHOSE NL



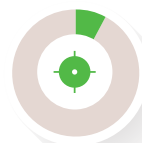
23%
Nature & Wildlife



18%
Bucket List



16%
Specific Areas



12%
Hunting / Fishing

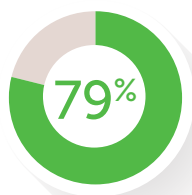


7%
People Culture Heritage

Top sites of interest include:
L'Anse aux Meadows, Gros Morne National Park, Fogo Island, & Western NL

TOP EXPERIENCES

OUTDOOR



Walking In and Around Communities



79% HIKING



55% VISITING NATIONAL PARKS

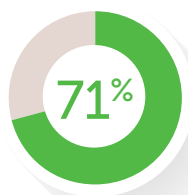


53% WILDLIFE VIEWING



51% SEABIRD WATCHING

CULTURAL



Exploring Small Communities



70% HISTORIC SITES



74% LIGHTHOUSES



64% CULINARY



43% GALLERIES/ EXHIBITS

TRIP PLANNING

American visitors prefer to **plan online** but still value traditional/ offline resources such as the NL Traveller's Guide and personal recommendations.

On average, Americans begin planning their trip

6.2 months in advance



TOP TRIP PLANNING SOURCES USED PRIOR TO TRAVELLING

1. Destination websites
2. Local accommodation websites
4. Attraction websites
5. Review websites
6. NewfoundlandLabrador.com

TOP TRIP PLANNING SOURCES USED DURING TRAVEL

1. Local residents
2. Local service personnel
3. Printed brochures
4. Destination websites
5. NL Traveller's Guide

TOP SOURCES FOR SELECTING ACCOMMODATIONS



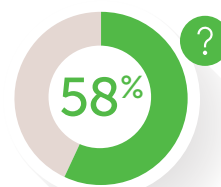
ACCOMMODATION WEBSITES



ONLINE HOTEL SEARCH/ BOOKING SITES



TRIP ADVISOR



of travellers use Visitor Information Centres (VICs)



VICS ARE IMPORTANT FOR US AUTO TRAVELLERS



75% USED A VIC



49% USED A VIC SPECIFICALLY FOR TRIP PLANNING ASSISTANCE