

2011 Exit Survey – Profile of Non-residents Visiting The Province’s Historic Sites



Signal Hill National Historic Site

Cape Bonavista Provincial Historic Site

Red Bay National Historic Site

Commissariat House Provincial Historic Site


Newfoundland
Labrador

Government of Newfoundland and
Labrador

Tourism Research Division

Department of Tourism, Culture and
Recreation

2011 Exit Survey – Historic Sites Visitors

PROJECT OVERVIEW

The 2011 Exit Survey served to update and enhance existing historical information on non-resident visitors to this Province. The program was undertaken to improve annual estimates of visitation and expenditure as well as to update visitor characteristics.

In addition to visitor characteristics, the survey also served to provide insight in visitors' motivations, attitudes, perceptions and opinions related to various aspects of our Tourism offering.

METHODOLOGY

Interviews were conducted with individuals leaving the Province through four major exit points. The 2011 Exit Survey Program covered all vehicle-related exit points from the Island portion of the province (Port Aux Basques and Argentia) and the major air exit points — St. John's and Deer Lake which represented 81% of all boarding passengers at the Province's seven major airports.

At each exit point, a short survey (referred to as partition survey) was administered using palm pilot technology to gather key information and identify non-resident visitors exiting the Province. A longer survey (referred to as main survey) was distributed to all willing non-resident travelers at each exit point.

The partition survey collected information related to origin, trip purpose, party size, length of stay and party composition. The main survey collected data on the characteristics of non-resident visitors, including destinations visited, participation in activities, expenditures and demographics.

Overall, a total of 17,279 partition interviews were conducted with non-residents exiting the Province at the four exit points and 4,083 questionnaires (main surveys) were returned. Survey participants had the

option of returning the main questionnaire via drop boxes at the exit points, by mail or responding online.

Table 1
2011 Exit Survey Program
Number of Non-Residents Surveyed

Survey	Air Jan-Apr Nov-Dec	Air May-Oct	Auto May-Oct	Total
Partition	2,853	10,972	3,454	17,279
Main	506	2,060	1,517	4,083

A detailed weighting system was applied to ensure the survey sample reflected the exiting non-resident population. It should be noted that the margin of error associated with the data varies depending on the size of the sample. Margin of error increase as sample sizes decrease.

Profile of Historic Site Visitors

This **Profile** report focuses on non-resident visitors who visited a National, Provincial or other Historic Site during the peak travel season of May to October.

The total estimate of non-resident parties visiting Newfoundland and Labrador during the May to October period is 158,456 with three fifths (59%) reporting they visited at least one of the province's historic sites.

It is estimated that between May and October 2011 approximately 93,692 travel parties or 200,775 non-resident visitors visited at least one of the provinces historic sites.

As can be seen in the table presented on the next page, 51% of the travel parties reported visiting a National Historic Site, 38% reported visiting a Provincial Historic Site and 15% reported a visit to other historic sites.

Table 2
2011 Exit Survey Program
% of Non-Resident Travel Parties Reporting a Visit

	% of Parties
National Historic Site	51%
Provincial Historic Site	38%
Other Historic Site	15%



MODE OF TRAVEL

Almost four fifths (78%) of the non-resident parties visiting a historic site came to the province by air. Compared to all non-resident travel parties, parties visiting a historic site are very similar in terms of the mode of travel to the province.

Table 3
2011 Non-Resident Travel Parties
Historic Sites Visitors By Mode
 (% Parties – May to October)

	Overall %Parties	Those Visiting a Historic Site % Parties
Airline Visitors	79%	78%
Automobile Visitors	21%	22%



ORIGIN

Travellers from Ontario account for two-fifths (38%) of non-residents visiting a historic site in Newfoundland and Labrador.

Table 4 presents the origins of travel parties to province and those who visited a historic site in 2011. Two fifths (38%) of those visiting historic sites came from Ontario, representing the province’s largest source market. With about one quarter (23%) of historic site visitors, residents of other Canada accounted for the second largest share of travel parties visiting historic sites.

In terms of other markets, Quebec represents 5% of the parties visiting historic sites while 19% of historic site visitors arrived from the Maritimes. Eleven percent of those visiting a historic site in the province travelled from the United States while 4% were from overseas.

Compared to non-resident travellers overall, parties visiting a historic site during their trip in the province were less likely to be from the Maritimes and more likely to be from Ontario and other Canada.

Table 4
2011 Non-Resident Travel Parties
Historic Sites Visitors By Origin
 (% Parties – May to October)

	Overall %Parties	Those Visiting a Historic Site % Parties
Maritimes	27%	19%
Quebec	5%	5%
Ontario	35%	38%
Other Canada	20%	23%
United States	9%	11%
Overseas	4%	4%

PURPOSE

The majority of non-resident parties visiting a historic site are in the province for vacation/pleasure purposes.

As can be seen in the **Table 5** presented below, almost half (46%) of non-resident parties visiting a historic site were visiting the Province for vacation or pleasure, while another 27% came to visit friends and relatives (VFR).

Seven percent came to attend a convention or conference and 18% for business reasons. Only 2% of the parties visiting a historic site came for some other reasons.

Compared to non-resident parties overall, parties visiting a historic site were more likely to be in the province for vacation/pleasure and less likely to be visiting the province for business reasons.

Table 5
2011 Non-Resident Travel Parties
Historic Sites Visitors By Purpose of Trip
(% Parties – May to October)

	Overall %Parties	Those Visiting a Historic Site %Parties
Vacation/Pleasure	34%	46%
VFR	31%	27%
Business	27%	18%
Convention/Conference	5%	7%
Other Reasons	3%	2%

PARTY SIZE & PARTY COMPOSITION

Average Party Size

The average party size for parties visiting a historic site was 2.0 individuals. Compared to travellers overall, parties visiting a historic site are slightly larger.

Table 6
2011 Non-Resident Travel Parties
Historic Sites Visitors Average Party Size
(May to October)

	Overall	Those Visiting a Historic Site
Average Party Size	1.8	2.0

Party Composition

One third (33%) of non-resident parties visiting a historic site consisted of couple(s) with no children, while 16% travelled with other family members. An additional 37% of those who visited a historic site travelled alone.

Compared to non-resident travellers in general, parties visiting a historic site were more likely to be travelling as couple(s) without children and less likely to be travelling alone.

Table 7
2011 Non-Resident Travel Parties
Historic Sites Visitors Party Composition
(% Parties May to October)

	Overall %Parties	Those Visiting a Historic Site % Parties
Alone	46%	37%
Couple(s), no children	27%	33%
Couple(s), with children	4%	5%
Other Family	14%	16%
Group of Friends	4%	6%
Business Associates	4%	4%



LENGTH OF STAY

Travel parties visiting a historic site spent more than a week in the province during their trip.

As can be seen in the table below, non-residents stayed, on average, 10.4 nights in the province. Parties visiting a historic site stayed 10.7 nights.

Table 8
2011 Non-Resident Travel Parties
Historic Sites Visitors Average Length of Stay
 (May to October)

	Overall	Those Visiting a Historic Site
Average Stay	10.4	10.7

EXPENDITURES

Travellers visiting a historic site reported higher than average in-province expenditures.

Non-resident travel parties visiting a historic site in the province reported an average in-province per party expenditure of \$2,124 and an average in-province per person expenditure of \$1,076. On a per person per night basis, travel parties visiting a historic site reported an average in province expenditure of \$136.

Compared to all non-resident travel parties, parties visiting a historic site reported higher than average in-province per party and per person expenditures. Specifically, per party and per person expenditures are 21% and 12% higher than the overall average.

With a slightly larger party size and similar length of stay in the province, parties visiting a historic site report a per person per night expenditure similar to travellers in general.



Table 9
2011 Non-Resident Travel Parties
Historic Sites Visitors Expenditure Levels
 (May to October)

	Overall	Those Visiting a Historic Site
Average per Party Expenditure	\$1,751	\$2,124
Average per Person Expenditure	\$960	\$1,076
Average per Person per Night Expenditure	\$137	\$136



ACCOMMODATION NIGHTS

The largest share of nights by non-resident parties visiting a historic site was spent in a hotel/motel (28%) followed by nights spent with relatives (20%). In terms of other commercial accommodations, 13% of nights of those visiting a historic site were spent in B&Bs/Country Inns and 8% in national, provincial or private campgrounds.

Compared to all travellers, non-resident parties visiting a historic site were more likely to stay in a B&B/Country Inn. In addition, almost 6 in 10 nights (61%) spent by those visiting a historic site were spent in paid accommodations. This compares to 52% for all travellers.

Table 10
2011 Non-Resident Travel Parties
Historic Sites Visitors % of Party Nights by Type of Accommodation (May to October)

	Overall % of Nights	Those Visiting a Historic Site % of Nights
Hotel/Motel	26%	28%
Commercial Cabins/Cottages	4%	5%
B&B/Country Inns	9%	13%
Houses of Relatives	28%	20%
Houses of Friends	9%	10%
Private Cabins/Cottages	5%	5%
Campgrounds – All Types	6%	8%
All Other Types of Accommodation	12%	11%



DESTINATIONS

St. John's and the Gros Morne area are key destinations for non-residents who visited a historic site in the province.

The most popular areas of the province visited by non-residents visiting a historic site include the St. John's

CMA, Gros Morne,, Gander/Twillingate East to Terra Nova and the Bonavista Peninsula.

Compared to all non-resident visitors, travel parties visiting a historic site reported higher than average party visits to St. John's, Gros Morne, the Viking Trail (South Anthony Southwest) and the Clarenville/Bonavista Peninsula.



Table 11

2011 Non-Resident Travel Parties

Historic Sites Visitors Areas of Province Visited (and stayed at least one overnight)

(% Parties - May to October)

	Overall	Those Visiting a Historic Site
Zone 1: Rigolet to Nain	0.3%	0.2%
Zone 2: Labrador West/Churchill Falls	0.5%	0.6%
Zone 3: Happy Valley/Goose Bay/Northwest River	0.6%	0.6%
Zone 4: Mary's Harbour to Cartwright	0.7%	1.0%
Zone 5: Labrador Straits (L'Anse Au Clair to Red Bay)	1.9%	2.7%
Zone 6: Viking Trail, St. Anthony South West to Plum Point, East to Roddington/Englee	12.3%	18.9%
Zone 7: Gros Morne Area, Viking Trail North to and including Plum Point	23.2%	31.6%
Zone 8: Deer Lake/Humber Area	12.3%	13.3%
Corner Brook/Massey Drive	11.5%	10.2%
Zone 9: Stephenville/Port-au-Port/Burgeo	6.0%	4.9%
Zone 10: Port-aux-Basques/Doyles/Rose Blanche	8.2%	10.3%
Zone 11: Baie Verte/La Scie/Green Bay	4.2%	4.6%
Zone 12: Grand Falls Windsor Area	8.2%	9.1%
Zone 13: Bay D'Espoir Area	0.8%	0.3%
Zone 14: Gander/Twillingate East to Terra Nova	21.7%	26.1%
Zone 15: Clarenville/Bonavista Peninsula Area	18.7%	25.3%
Zone 16: Burin Peninsula	3.3%	3.8%
Zone 17: North West Avalon	8.2%	9.7%
Zone 18: Argentia/Placentia Area	5.4%	6.5%
Zone 19: North East Avalon (Excluding St. John's and Mount Pearl)	8.6%	9.1%
St. John's CMA (including Mount Pearl)	66.3%	75.0%
Zone 20: Southern Shore Area	5.0%	7.3%

Please note that the “% of parties visiting” is not additive across Economic Zones – that is, the same visiting party could have spent at least one night in more than one Zone and therefore would be included in the percentage for all Zones visited.

DEMOGRAPHICS

The demographic profile of non-residents visiting a historic site in Newfoundland and Labrador is very similar to that of non-resident visitors overall.

Forty-nine percent of non-resident visitors to the province who visited a historic site during May to October of 2011 were age 55 or older, including 21% who were 65 years or older.

Eighty two percent of non-residents who reported visiting a historic site graduated university (52% with an undergraduate degree and 30% with a post-graduate degree) while 7% indicated a level of education less than high school.

One-half (50%) of travel parties that reported visiting a historic site in the province had average annual household incomes of greater than \$100,000 while only 8% reported incomes of less than \$40,000.



Table 12
2011 Non-Resident Visitors
Historic Sites Visitors: Age

	Overall	Those Visiting a Historic Site
Under 35	20%	19%
35 – 44	13%	11%
45 – 54	22%	21%
55 – 64	27%	28%
65 and Over	19%	21%

Table 13
2011 Non-Resident Visitors
Historic Sites Visitors: Education

	Overall	Those Visiting a Historic Site
High School or Less	9%	7%
Community/Technical College	13%	11%
University	51%	52%
Post Graduate	27%	30%

Table 14
2011 Non-Resident Visitors
Historic Sites Visitors: Household Income

	Overall	Those Visiting a Historic Site
Less than \$40,000	8%	8%
\$40,000 - \$69,999	21%	21%
\$70,000 - \$99,999	22%	21%
\$100,000 or more	49%	50%