

2011 Exit Survey – Whales, Birds & Icebergs



"Whales, Birds and Icebergs of Newfoundland and Labrador"



Government of Newfoundland and
Labrador
Tourism Research Division
Department of Tourism, Culture and
Recreation

2011 Exit Survey – Whales, Birds and Icebergs

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.

Whales, Birds and Icebergs

This **Profile** report focuses on non-resident visitors who participated in whale watching, bird watching and iceberg viewing 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 two fifths (41%) reporting they viewed at least one of whales, birds and icebergs during their visit.

It is estimated that between May and October 2011 approximately 65,150 travel parties or 146,716 non-resident visitors viewed at least one of whales, birds and icebergs.

As can be seen in the table presented on the next page, 28% of the travel parties reported whale watching, 21% reported bird watching and 21% of the travel parties reported iceberg viewing.

Table 2
2011 Exit Survey Program
% of Parties Reporting:

| | % of Parties |
|-----------------|--------------|
| Whale watching | 28% |
| Bird watching | 21% |
| Iceberg viewing | 21% |



MODE OF TRAVEL

Three-quarters (73%) of the non-resident parties viewing whales, birds and icebergs in the province came to the province by air. Compared to all travellers, visiting parties viewing whales, birds and icebergs in the province were more likely to have travelled to the province by automobile (27% versus 21%)

Table 3
2011 Non-Resident Parties Whales, Birds & Icebergs by Mode
 (% Parties – May to October)

| | Overall %Parties | Whales, Birds & Icebergs % Parties |
|---------------------|------------------|------------------------------------|
| Airline Visitors | 79% | 73% |
| Automobile Visitors | 21% | 27% |



ORIGIN

Travellers from Ontario account for over two-fifths (42%) of non-residents viewing whales, birds and icebergs during their visit to Newfoundland and Labrador.

Table 4 presents the origins of travel parties who visited the province and viewed whales, birds and icebergs in 2011. Over two fifths (42%) of those viewing whales, birds and icebergs came from Ontario, representing the province’s largest source market. With just over one fifth (22%) of travellers viewing whales, birds and icebergs, residents of other Canada accounted for the second largest share of travel parties engaging in these activities.

In terms of other markets, Quebec represents 5% of the parties viewing whales, birds and icebergs while 13% of those viewing whales, birds and icebergs arrived from the Maritimes. In addition, thirteen percent of those viewing whales, birds and icebergs in the province travelled from the United States while 5% were from overseas.

Compared to the non-resident travellers overall, parties viewing whales, birds and icebergs during their visit to the province were less likely to be from the Maritimes and more likely to be from Ontario.

Table 4
2011 Non-Resident Parties Whales, Birds & Icebergs by Origin
 (% Parties – May to October)

| | Overall %Parties | Whales, Birds & Icebergs % Parties |
|---------------|------------------|------------------------------------|
| Maritimes | 27% | 13% |
| Quebec | 5% | 5% |
| Ontario | 35% | 42% |
| Other Canada | 20% | 22% |
| United States | 9% | 13% |
| Overseas | 4% | 5% |

PURPOSE

The majority of non-resident parties viewing whales, birds and icebergs were in the province for vacation/pleasure.

As can be seen in the **Table 5** presented below, almost three fifths (57%) of non-resident parties viewing whales, birds and icebergs were visiting the province for vacation or pleasure, while another 25% came to visit friends and relatives (VFR).

Five percent came to attend a convention or conference and 12% for business reasons. Only 1% of the parties viewing whales, birds and icebergs came for some other reasons.

Compared to non-resident parties overall, parties viewing whales, birds and icebergs were more likely to be in the province for vacation/pleasure and less likely to be visiting for VFR or business reasons.

Table 5
2011 Non-Resident Parties Whales, Birds & Icebergs by Purpose of Trip
(% Parties – May to October)

| | Overall %Parties | Whales, Birds & Icebergs %Parties |
|-----------------------|------------------|-----------------------------------|
| Vacation/Pleasure | 34% | 57% |
| VFR | 31% | 25% |
| Business | 27% | 12% |
| Convention/Conference | 5% | 5% |
| Other Reasons | 3% | 1% |

PARTY SIZE & PARTY COMPOSITION

Average Party Size

The average party size for parties viewing whales, birds and icebergs was 2.1 individuals. Compared to travellers overall, parties viewing whales, birds and icebergs were slightly larger.

Table 6
2011 Non-Resident Parties Whales, Birds & Icebergs: Average Party Size (May to October)

| | Overall | Whales, Birds & Icebergs |
|--------------------|---------|--------------------------|
| Average Party Size | 1.8 | 2.1 |

Party Composition

Almost two fifths (38%) of non-resident parties viewing whales, birds and icebergs consisted of couple(s) with no children, while 18% travelled with other family members. An additional one quarter (27%) of those who viewed whales, birds and icebergs travelled alone.

Compared to non-resident travellers in general, parties viewing whales, birds and icebergs were more likely to be travelling as couple(s) without children and less likely to be travelling alone.

Table 7
2011 Non-Resident Parties Whales, Birds & Icebergs: Party Composition (% Parties May to October)

| | Overall %Parties | Those Visiting a Historic Site % Parties |
|--------------------------|------------------|--|
| Alone | 46% | 27% |
| Couple(s), no children | 27% | 38% |
| Couple(s), with children | 4% | 6% |
| Other Family | 14% | 18% |
| Group of Friends | 4% | 8% |
| Business Associates | 4% | 3% |



LENGTH OF STAY

Travel parties viewing whales, birds and icebergs spent close to two weeks 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 viewing whales, birds and icebergs stayed 12.2 nights.

Table 8
2011 Non-Resident Parties Whales, Birds & Icebergs: Average Length of Stay
 (May to October)

| | Overall | Whales, Birds & Icebergs |
|--------------|---------|--------------------------|
| Average Stay | 10.4 | 12.2 |

EXPENDITURES

Travellers viewing whales, birds and icebergs reported higher than average in-province expenditures.

Non-resident travel parties viewing whales, birds and icebergs in the province reported an average in-province per party expenditure of \$2,390 and an average in-province per person expenditure of \$1,146. On a per person per night basis, travel parties viewing whales, birds and icebergs reported an average in province expenditure of \$123.

Compared to all non-resident travel parties, parties viewing whales, birds and icebergs in the province reported higher than average in-province per party and per person expenditures. Specifically, per party and per person expenditures were 36% and 19% higher than the overall average.

With a slightly larger party size and longer length of stay in the province, parties viewing whales, birds and icebergs reported a lower per person per night expenditure (-10%) when compared to travellers in general.



Table 9
2011 Non-Resident Parties Whales, Birds & Icebergs: Expenditure Levels (May to October)

| | Overall | Whales, Birds & Icebergs |
|--|---------|--------------------------|
| Average per Party Expenditure | \$1,751 | \$2,390 |
| Average per Person Expenditure | \$960 | \$1,146 |
| Average per person per Night Expenditure | \$137 | \$123 |



ACCOMMODATION NIGHTS

The largest share of nights by non-resident parties viewing whales, birds and icebergs was spent in a hotel/motel (25%) followed by nights spent with relatives (18%). In terms of other commercial accommodations, 15% of nights of those viewing whales, birds and icebergs were spent in B&Bs/Country Inns and 9% in national, provincial or private campgrounds.

Compared to all travellers, non-resident parties viewing whales, birds and icebergs were more likely to stay in a B&B/Country Inn. In addition, almost 6 in 10 nights (62%) spent by those viewing whales, birds and icebergs were spent in paid accommodations. This compares to 52% for all travellers.

Table 10
2011 Non-Resident Travel Parties Whales, Birds & Icebergs: % of Party Nights by Type of Accommodation (May to October)

| | Overall % of Nights | Whales, Birds & Icebergs % of Nights |
|----------------------------------|---------------------|--------------------------------------|
| Hotel/Motel | 26% | 25% |
| Commercial Cabins/Cottages | 4% | 6% |
| B&B/Country Inns | 9% | 15% |
| Houses of Relatives | 28% | 18% |
| Houses of Friends | 9% | 10% |
| Private Cabins/Cottages | 5% | 6% |
| Campgrounds – All Types | 6% | 9% |
| All Other Types of Accommodation | 12% | 11% |



DESTINATIONS

St. John's and the Gros Morne area were popular destinations for non-residents viewing whales, birds and icebergs

The most popular areas of the province visited by non-residents viewing whales, birds and icebergs 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 that viewed whales, birds and icebergs reported higher than average party visits to Gros Morne/Viking Trail, Gander/Twillingate and the Bonavista Peninsula.



Table 11
2011 Non-Resident Travel Parties Whales, Birds & Icebergs
Areas of Province Visited (and stayed at least one overnight)
 (% Parties - May to October)

| | Overall | Whales, Birds & Icebergs |
|---|---------|--------------------------|
| Zone 1: Rigolet to Nain | 0.3% | 0.0% |
| Zone 2: Labrador West/Churchill Falls | 0.5% | 0.5% |
| Zone 3: Happy Valley/Goose Bay/Northwest River | 0.6% | 0.9% |
| Zone 4: Mary's Harbour to Cartwright | 0.7% | 1.5% |
| Zone 5: Labrador Straits (L'Anse Au Clair to Red Bay) | 1.9% | 4.0% |
| Zone 6: Viking Trail, St. Anthony South West to Plum Point, East to Roddington/Englee | 12.3% | 27.2% |
| Zone 7: Gros Morne Area, Viking Trail North to and including Plum Point | 23.2% | 41.2% |
| Zone 8: Deer Lake/Humber Area | 12.3% | 16.7% |
| Corner Brook/Massey Drive | 11.5% | 11.6% |
| Zone 9: Stephenville/Port-au-Port/Burgeo | 6.0% | 6.0% |
| Zone 10: Port-aux-Basques/Doyles/Rose Blanche | 8.2% | 12.9% |
| Zone 11: Baie Verte/La Scie/Green Bay | 4.2% | 6.8% |
| Zone 12: Grand Falls Windsor Area | 8.2% | 11.9% |
| Zone 13: Bay D'Espoir Area | 0.8% | 0.4% |
| Zone 14: Gander/Twillingate East to Terra Nova | 21.7% | 34.9% |
| Zone 15: Clarenville/Bonavista Peninsula Area | 18.7% | 32.1% |
| Zone 16: Burin Peninsula | 3.3% | 3.3% |
| Zone 17: North West Avalon | 8.2% | 11.7% |
| Zone 18: Argentia/Placentia Area | 5.4% | 8.9% |
| Zone 19: North East Avalon (Excluding St. John's and Mount Pearl) | 8.6% | 8.2% |
| St. John's CMA (including Mount Pearl) | 66.3% | 70.8% |
| Zone 20: Southern Shore Area | 5.0% | 9.2% |

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 viewing whales, birds and icebergs in Newfoundland and Labrador is similar to that of non-resident visitors overall.

One half (50%) of non-resident visitors to the province who viewed whales, birds and icebergs during May to October of 2011 were age 55 or older, including 23% who were 65 years or older, a slightly higher share than travellers overall.

Eighty percent of non-residents who reported viewing whales, birds and icebergs graduated university (49% with an undergraduate degree and 31% with a post-graduate degree) while 9% indicated a level of education less than high school.

Almost one-half (46%) of travel parties that who viewed whales, birds and icebergs reported an average annual household incomes of greater than \$100,000 while only 9% reported incomes of less than \$40,000.



Table 12
2011 Non-Resident Visitors Whales, Birds & Icebergs: Age

| | Overall | Whales, Birds & Icebergs |
|-------------|---------|--------------------------|
| Under 35 | 20% | 19% |
| 35 – 44 | 13% | 10% |
| 45 – 54 | 22% | 21% |
| 55 – 64 | 27% | 27% |
| 65 and Over | 19% | 23% |

Table 13
2011 Non-Resident Visitors Whales, Birds & Icebergs: Education

| | Overall | Whales, Birds & Icebergs |
|-----------------------------|---------|--------------------------|
| High School or Less | 9% | 9% |
| Community/Technical College | 13% | 11% |
| University | 51% | 49% |
| Post Graduate | 27% | 31% |

Table 14
2011 Non-Resident Visitors Whales, Birds & Icebergs: Household Income

| | Overall | Whales, Birds & Icebergs |
|---------------------|---------|--------------------------|
| Less than \$40,000 | 8% | 9% |
| \$40,000 - \$69,999 | 21% | 21% |
| \$70,000 - \$99,999 | 22% | 23% |
| \$100,000 or more | 49% | 46% |