

2011 Exit Survey Profile of Non-residents Participating in Geological Tours/Fossil Observation



Mistaken Point Ecological Reserve



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

2011 Exit Survey – Geological Tours/Fossil Observation

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 shows the breakdown of surveys collected.

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 Non-residents Participating in Geological Tours/Fossil Observation

Note to readers: Unless otherwise stated, results for business travellers include those travelling to the province for conventions/conferences.

This **Profile** report focuses on non-resident visitors who participated in organized or self-directed geological tours/fossil observation as a trip activity 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 8% reporting they participated in geological tours/fossil observation as a trip activity. It is estimated that between May and October 2011 approximately 13,066 travel parties or 29,845 non-residents participated in organized or self-directed geological tours/fossil observation.

MODE OF TRAVEL

Seventy-six percent of the non-resident parties participating in geological tours/fossil observation came to the province by air. This is very similar to the overall distribution of visitors by mode of travel.

Table 1
2011 Non-Resident Parties participating in Geological Tours/Fossil Observation
By Mode

(% Parties – May to October)

	Overall %Parties	Geological Tours/Fossil Observation % Parties
Air Visitors	79%	76%
Automobile Visitors	21%	24%

ORIGIN

Travellers from Ontario and Other Canada make up 62% of non-residents participating in Geological Tours/Fossil Observation in Newfoundland and Labrador.

Table 2 presents the origins of travel parties who visited the province and reported participating in geological tours/fossil observation in 2011. Almost two fifths (37%) came from Ontario, the province’s largest source market. With one quarter (25%), residents of other Canada accounted for the second largest share of travel parties participating in geological tours/fossil observation.

In terms of other markets, Quebec represented 3% of non-resident parties participating in geological tours/fossil observation while only 14% arrived from the Maritimes. As well, 17% travelled from the United States while an additional 4% were from overseas. Compared to travellers overall, parties participating in geological tours/fossil observation during their visit to

the province were more likely to be from United States and other Canada and less likely to be from the Maritimes.

Table 2
2011 Non-Resident Parties participating in Geological Tours/Fossil Observation
By Origin

(% Parties – May to October)

	Overall %Parties	Geological Tours/Fossil Observation % Parties
Maritimes	27%	14%
Quebec	5%	3%
Ontario	35%	37%
Other Canada	20%	25%
United States	9%	17%
Overseas	4%	4%

PURPOSE

Most of non-resident parties participating in geological tours/fossil observation travelled for vacation/pleasure

As can be seen in the table presented on the next page, 58% of non-resident parties participating in geological tours/fossil observation travelled to the province for vacation/pleasure while another 26% came to visit friends/relatives.

Six percent came to attend a convention or conference and 7% for business reasons. Only 3% of travellers participating in geological tours/fossil observation came for some other reasons.

Compared to all travellers in general, parties participating in geological tours/fossil observation were more likely to be in the province for vacation/pleasure purposes and less likely to be visiting for business reasons.

Table 3
2011 Non-Resident Parties participating in Geological Tours/Fossil Observation
By Purpose of Trip
 (% Parties – May to October)

	Overall %Parties	Geological Tours/Fossil Observation % Parties
Vacation/Pleasure	34%	58%
VFR	31%	26%
Business	27%	7%
Convention/Conference	5%	6%
Other Reasons	3%	3%

PARTY SIZE & PARTY COMPOSITION

Average Party Size

The average party size for parties participating in geological tours/fossil observation was 2.3 individuals. Compared to all visitors, parties participating in geological tours/fossil observation are slightly larger.

Table 4
2011 Non-Resident Exiting Parties participating in Geological Tours/Fossil Observation: Average Party Size
 (May to October)

	Overall	Geological Tours/Fossil Observation
Average Party Size	1.8	2.3

Party Composition

Over two-fifths (45%) of non-resident parties participating in geological tours/fossil observation consisted of couple(s) with no children, with an additional 19% travelling with other family members.

Twenty-two percent of those participating in geological tours/fossil observation travelled to the province alone.

Compared to non-resident travellers in general, parties participating in geological tours/fossil observation were more likely to be travelling without children and less likely to be travelling alone.

Table 5
2011 Non-Resident Exiting Parties participating in Geological Tours/Fossil Observation: Party Composition
 (% Parties May to October)

	Overall %Parties	Geological Tours/Fossil Observation % Parties
Alone	46%	22%
Couple(s), no children	27%	45%
Couple(s), with children	4%	5%
Other Family	14%	19%
Group of Friends	4%	8%
Business Associates	4%	1%

LENGTH OF STAY

As can be seen in the table below, non-residents stayed, on average, 10.4 nights in the province. Parties participating in geological tours/fossil observation stayed almost 3 nights longer at 13.3 nights.

Table 6
2011 Non-Resident Parties participating in Geological Tours/Fossil Observation: Average Length of Stay (May to October)

	Overall	Geological Tours/Fossil Observation
Average Stay	10.4	13.3

EXPENDITURES

Travellers participating in geological tours/fossil observation as a trip activity reported higher than average in-province expenditures.

Non-resident travel parties participating in organized or self-directed geological tours/fossil observation reported an average in-province per party expenditure of \$2,516 and an average in-province per person expenditure of \$1,120. On a per person per night basis, travel parties who participated in geological tours/fossil observation reported an average in province expenditure of \$115.

Compared to all non-resident travel parties, parties participating in geological tours/fossil observation reported higher than average in-province per party and per person expenditures. Specifically, per party and per person expenditures are approximately 44% and 17% higher respectively than the overall average.

Given the slightly larger party size and longer length of stay in the province for parties participating in geological tours/fossil observation, the person per night expenditure level is lower (-16%) than the overall average.

Table 7
2011 Non-Resident Parties participating in Geological Tours/Fossil Observation Expenditure Levels
 (May to October)

	Overall	Geological Tours/Fossil Observation
Average per Party Expenditure	\$1,751	\$2,516
Average per Person Expenditure	\$960	\$1,120
Average per person per Night Expenditure	\$137	\$115

ACCOMMODATION NIGHTS

Most nights by non-resident parties participating in geological tours/fossil observation were spent in hotels/motels (26%) followed by nights with relatives (20%). In terms of other commercial accommodations, 14% of nights of those who participated in geological tours/fossil observation while on their trip in the province were spent in B&B/Country Inns and 14% in national, provincial or private campgrounds.

Compared to travellers overall, non-resident parties participating in organized or self-directed geological tours/fossil observation were more likely to stay in B&B/country Inns and campgrounds and less likely to stay in homes of relatives.

Table 8
2011 Non-Resident Travel Parties participating in Geological Tours/Fossil Observation % of Party Nights by Type of Accommodation
 (May to October)

	Overall % of Nights	Geological Tours/Fossil Observation % of Nights
Hotel/Motel	26%	26%
Commercial Cabins/Cottages	4%	6%
B&B/Country Inns	9%	14%
Houses of Relatives	28%	20%
Houses of Friends	9%	6%
Private Cabins/Cottages	5%	5%
Campgrounds – All Types	6%	14%
All Other Types of Accommodation	12%	9%

DESTINATIONS

St. John's and Gros Morne/Viking Trail are key destinations for non-resident visitors participating in geological tours/fossil observation.



Fortune Head Ecological Reserve

The most popular areas of the province visited by non-residents participating in geological tours/fossil observation include the St. John's CMA and the Gros Morne/Viking Trail area.

Compared to all non-resident visitors, travel parties participating in geological tours/fossil observation reported higher than average party visits to the Gros Morne and Viking Trail area.

Table 9
2011 Non-Resident Travel Parties participating in Geological Tours/Fossil Observation
Areas of Province Visited (and stayed at least one overnight)
 (% Parties - May to October)

	Overall	Geological Tours/Fossil Observation
Zone 1: Rigolet to Nain	0.3%	0.2%
Zone 2: Labrador West/Churchill Falls	0.5%	0.4%
Zone 3: Happy Valley/Goose Bay/Northwest River	0.6%	0.6%
Zone 4: Mary's Harbour to Cartwright	0.7%	2.0%
Zone 5: Labrador Straits (L'Anse Au Clair to Red Bay)	1.9%	5.1%
Zone 6: Viking Trail, St. Anthony South West to Plum Point, East to Roddington/Englee	12.3%	30.7%
Zone 7: Gros Morne Area, Viking Trail North to and including Plum Point	23.2%	44.9%
Zone 8: Deer Lake/Humber Area	12.3%	15.7%
Corner Brook/Massey Drive	11.5%	12.5%
Zone 9: Stephenville/Port-au-Port/Burgeo	6.0%	7.2%
Zone 10: Port-aux-Basques/Doyles/Rose Blanche	8.2%	11.4%
Zone 11: Baie Verte/La Scie/Green Bay	4.2%	6.0%
Zone 12: Grand Falls Windsor Area	8.2%	10.8%
Zone 13: Bay D'Espoir Area	0.8%	0.0%
Zone 14: Gander/Twillingate East to Terra Nova	21.7%	29.2%
Zone 15: Clarenville/Bonavista Peninsula Area	18.7%	29.7%
Zone 16: Burin Peninsula	3.3%	4.2%
Zone 17: North West Avalon	8.2%	8.5%
Zone 18: Argentia/Placentia Area	5.4%	6.4%
Zone 19: North East Avalon (Excluding St. John's and Mount Pearl)	8.6%	10.5%
St. John's CMA (including Mount Pearl)	66.3%	68.0%
Zone 20: Southern Shore Area	5.0%	10.8%

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.

ACTIVITIES

Non-resident visitors participating in geological tours/fossil observation in Newfoundland and Labrador are actively participating in outdoor and nature-based activities.

Table 10 presents the varying participation levels in outdoor and nature-based activities, showing that those visitors participating in geological tours/fossil observation pursued other activities to a much greater extent than visitors in general as well as vacation/pleasure visitors. Scenic touring, pleasure walking, provincial and national parks as well trail hiking were among their top activities.

Table 10
2011 Non-Resident Travel Parties participating in Geological Tours/Fossil Observation
Participation in Nature and Outdoor Activities
(% Parties - May to October)

	Total	Vacation Pleasure	Geological Tours/Fossil Observation
Scenic touring	67%	83%	90%
Pleasure walking in/around communities	64%	77%	88%
Visit a National Park	34%	59%	63%
Trail hiking	32%	48%	61%
Visit a Provincial Park and/or Ecological Reserve	30%	52%	66%
Whale watching	28%	47%	53%
Sightseeing boat tour	27%	48%	52%
Wildlife viewing	22%	39%	50%
Iceberg viewing	21%	44%	45%
Hiking in wilderness areas	21%	37%	42%
Bird watching	21%	33%	46%
Guided tours	11%	20%	33%
Visit a nature park	11%	17%	33%
Fishing (other than guided trip)	8%	7%	10%
Berry picking	7%	8%	16%
Botanical garden/plant observation	7%	11%	36%
Golfing	6%	5%	6%
Sea kayaking	3%	5%	9%
All Terrain Vehicle (ATV) touring	3%	2%	5%
Fishing (guided trip)	2%	4%	7%
Freshwater canoeing/kayaking/rafting	2%	3%	6%
Cycling	2%	2%	6%
Hunting - big game (black bear, moose, caribou)	1%	3%	5%
Mountain biking	1%	1%	5%
Hunting - small game and birds	1%	0%	4%

Please note that the data presented for non-resident automobile visitors was collected at Port-aux-Basques and Argentia while the data presented for non-resident air visitors was collected at the St. John's and Deer Lake airports. Also note, the "percentage of parties participating" is not additive across activities.

DEMOGRAPHICS

Non-resident visitors participating in geological tours/fossil observation in Newfoundland and Labrador tend to be older than non-resident visitors on average and are well-educated.

Fifty-six percent of non-resident visitors to the province who participated in geological tours/fossil observation during May to October of 2011 were age 55 or older, including 27% who were 65 years or older. Compared to non-resident visitors overall, visitors who reported participating in geological tours/fossil observation as a trip activity were less likely to be under 45 years of age.

More than 4 in 5 (81%) of non-resident visitors that participated in an organized or self-directed geological tour/fossil observation as a trip activity graduated university (52% with an undergraduate degree and 29% with a post-graduate degree), while only 7% indicated a level of education less than high school. Non-resident visitors who reported participating in geological tours/fossil observation had very similar education levels when compared to all non-resident visitors overall.

One half of travel parties that participated in organized or self-directed geological tour/fossil observation reported an average annual household income of greater than \$100,000 while only 9% reported incomes of less than \$40,000. Non-residents who reported participating in geological tours/fossil observation had very similar household incomes compared to all travellers in general.

Table 11
2011 Non-Resident Visitors participating in Geological Tours/Fossil Observation
Age

	Overall	Geological Tours/Fossil Observation
Under 35	20%	17%
35 – 44	13%	7%
45 – 54	22%	19%
55 – 64	27%	29%
65 and Over	19%	27%

Table 12
2011 Non-Resident Visitors participating in Geological Tours/Fossil Observation
Education

	Overall	Geological Tours/Fossil Observation
High School or Less	9%	7%
Community/Technical College	13%	12%
University	51%	52%
Post Graduate	27%	29%

Table 13
2011 Non-Resident Visitors participating in Geological Tours/Fossil Observation
Average Annual Household Income

	Overall	Geological Tours/Fossil Observation
Less than \$40,000	8%	9%
\$40,000 - \$69,999	21%	23%
\$70,000 - \$99,999	22%	18%
\$100,000 or more	49%	50%