

# 2011 Exit Survey Profile of Non-resident Golfers



18<sup>th</sup> Hole, The Wilds Golf Resort



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

# 2011 Exit Survey – Profile of Non-resident Golfers

## 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-resident Golfers

**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 golfing 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 only 6% reporting they participated in golfing as an activity. It is estimated that between May and October 2011 approximately 8,847 travel parties or 20,005 non-resident visitors participated in golfing as a trip activity.

## MODE OF TRAVEL

Eighty-two percent of the non-resident parties reporting golfing as an activity came to the province by air. Compared to all travellers in general, visiting parties participating in golfing are slightly more likely to have travelled to the province by air (82% versus 79%)

**Table 1**  
**2011 Non-Resident Parties Golfing**

**By Mode**

(% Parties – May to October)

	Overall %Parties	Those Participating in Golfing % Parties
Airline Visitors	79%	82%
Automobile Visitors	21%	18%

## ORIGIN

*Travellers from Ontario and Other Canada make up almost 64% of non-resident golfers to Newfoundland and Labrador.*

**Table 2** presents the origins of travel parties who visited the Province and reported golfing in 2011. One third (32%) of golfers came from Ontario; representing the Province's largest source market. Also with about one third of golfers (32%), residents of other Canada accounted for the second largest share of travel parties participating in golf.

In terms of other markets, Quebec represents 3% of non-resident parties reporting golfing as an activity while 23% of golfers arrived from the Maritimes. Five percent of golfers travelled from the United States while an additional 5% were from overseas.

Compared to travellers overall, parties participating in golfing as an activity during their visit to the province were more likely to be from other Canada.

**Table 2**  
**2011 Non-Resident Parties Golfing**

**By Origin**

(% Parties – May to October)

	Overall %Parties	Those Participating in Golfing % Parties
Maritimes	27%	23%
Quebec	5%	3%
Ontario	35%	32%
Other Canada	20%	32%
United States	9%	5%
Overseas	4%	5%

## PURPOSE

*Most of non-resident parties participating in golfing travelled to the province to visit friends and relatives*

As can be seen in the table presented on the next page, 41% of non-resident parties participating in golfing travelled to the Province to visit friends and relatives (VFR), while another 33% came for vacation or pleasure.

Five percent came to attend a convention or conference and 18% for business reasons. Only 3% of visitors participating in golfing as an activity came for some other reasons.

Compared to all travellers in general, parties participating in golfing were more likely to be in the province to visit friends and relatives and less likely to be visiting for business reasons.

**Table 3**  
**2011 Non-Resident Parties Golfing**  
**By Purpose of Trip**  
 (% Parties – May to October)

	Overall %Parties	Those Participating in Golfing % Parties
Vacation/Pleasure	34%	33%
VFR	31%	41%
Business	27%	18%
Convention/Conference	5%	5%
Other Reasons	3%	3%

## PARTY SIZE & PARTY COMPOSITION

### Average Party Size

The average party size for parties participating in golf was 2.3 individuals. Compared to all visitors, parties participating in golf are slightly larger.

**Table 4**  
**2011 Non-Resident Exiting Parties Golfing**  
**Average Party Size**  
 (May to October)

	Overall	Those Participating in Golfing
Average Party Size	1.8	2.3

### Party Composition

Twenty nine percent (29%) of non-resident parties participating in golfing consisted of couple(s) with no children, with an additional 19% travelling with other family members. Almost two fifths (37%) of those who participated in golf travelled alone.

Compared to non-resident travellers in general, parties participating in golf as a trip activity were more likely to be travelling with other family and less likely to be travelling alone.

**Table 5**  
**2011 Non-Resident Exiting Parties Golfing**  
**Party Composition**  
 (% Parties May to October)

	Overall %Parties	Those Participating in Golfing % Parties
Alone	46%	37%
Couple(s), no children	27%	29%
Couple(s), with children	4%	8%
Other Family	14%	19%
Group of Friends	4%	2%
Business Associates	4%	6%

## LENGTH OF STAY

### *Travel parties participating in golfing 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 participating in golfing as a trip activity stayed almost 4 nights longer at 14.0 nights.

**Table 6**  
**2011 Non-Resident Parties Golfing**  
**Average Length of Stay**  
 (May to October)

	Overall	Those Participating in Golfing
Average Stay	10.4	14.0

## EXPENDITURES

***Travellers participating in golfing as a trip activity reported higher than average in-province expenditures.***

Non-resident travel parties participating in golf reported an average in-province per party expenditure of \$1,901 and an average in-province per person expenditure of \$1,028. On a per person per night basis, travel parties who golfed reported an average in province expenditure of \$129.

Compared to all non-resident travel parties, parties participating in golf reported higher than average in-province per party and per person expenditures. Specifically, per party and per person expenditures are approximately 9% higher and 7% higher respectively than the overall average.

Given the slightly larger party size and longer length of stay in the province for parties participating in golf, the person per night expenditure level is about 6% lower than the overall average.

**Table 7**  
**2011 Non-Resident Parties Golfing**  
**Expenditure Levels**  
(May to October)

	Overall	Those Participating in Golfing
Average per Party Expenditure	\$1,751	\$1,901
Average per Person Expenditure	\$960	\$1,028
Average per person per Night Expenditure	\$137	\$129

## ACCOMMODATION NIGHTS

Most nights by non-resident parties participating in golf were spent in homes of relatives (43%) followed by nights in hotels/motels (20%). In terms of other commercial accommodations, 7% of nights of those who played golf while on their trip in the province were spent in B&Bs/Country Inns and 6% in national, provincial or private campgrounds.

Compared to travellers overall, non-resident parties participating in golf were more likely to stay in homes of relatives. In addition, 61% of the nights spent by those participating in golfing were spent in unpaid accommodations. This compares to 47% of all travel parties.

**Table 8**  
**2011 Non-Resident Travel Parties Golfing**  
**% of Party Nights by Type of Accommodation**  
(May to October)

	Overall % of Nights	Those Participating in Golfing % of Nights
Hotel/Motel	26%	20%
Commercial Cabins/Cottages	4%	3%
B&B/Country Inns	9%	7%
Houses of Relatives	28%	43%
Houses of Friends	9%	9%
Private Cabins/Cottages	5%	7%
Campgrounds – All Types	6%	6%
All Other Types of Accommodation	12%	5%

## DESTINATIONS

***St. John's and the Gander/Twillingate East to Terra Nova are key destinations for non-resident visitors participating in golf.***



The most popular areas of the Province visited by non-residents participating in golfing include the St. John's CMA, Gander/Twillingate east to Terra Nova and the Deer Lake/Humber area.

Compared to all non-resident visitors, travel parties participating in golf reported lower than average party visits to the Viking Trail and Gros Morne while they were more likely to visit areas in the Avalon region.

**Table 9**  
**2011 Non-Resident Travel Parties Golfing**  
**Areas of Province Visited (and stayed at least one overnight)**  
 (% Parties - May to October)

	Overall	Those Participating in Golfing
Zone 1: Rigolet to Nain	0.3%	0.0%
Zone 2: Labrador West/Churchill Falls	0.5%	0.0%
Zone 3: Happy Valley/Goose Bay/Northwest River	0.6%	0.6%
Zone 4: Mary's Harbour to Cartwright	0.7%	0.6%
Zone 5: Labrador Straits (L'Anse Au Clair to Red Bay)	1.9%	0.9%
Zone 6: Viking Trail, St. Anthony South West to Plum Point, East to Roddington/Englee	12.3%	7.6%
Zone 7: Gros Morne Area, Viking Trail North to and including Plum Point	23.2%	19.9%
Zone 8: Deer Lake/Humber Area	12.3%	20.9%
Corner Brook/Massey Drive	11.5%	16.3%
Zone 9: Stephenville/Port-au-Port/Burgeo	6.0%	6.3%
Zone 10: Port-aux-Basques/Doyles/Rose Blanche	8.2%	7.5%
Zone 11: Baie Verte/La Scie/Green Bay	4.2%	4.0%
Zone 12: Grand Falls Windsor Area	8.2%	8.2%
Zone 13: Bay D'Espoir Area	0.8%	0.4%
Zone 14: Gander/Twillingate East to Terra Nova	21.7%	34.3%
Zone 15: Clarenville/Bonavista Peninsula Area	18.7%	20.0%
Zone 16: Burin Peninsula	3.3%	5.3%
Zone 17: North West Avalon	8.2%	11.9%
Zone 18: Argentia/Placentia Area	5.4%	9.5%
Zone 19: North East Avalon (Excluding St. John's and Mount Pearl)	8.6%	12.7%
St. John's CMA (including Mount Pearl)	66.3%	59.6%
Zone 20: Southern Shore Area	5.0%	3.7%

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

*Non-resident visitors reporting participation in golfing in Newfoundland and Labrador tend to be younger, well-educated and more affluent than non-resident visitors on average.*

Over one third (35%) of non-resident visitors to the Province who participated in golfing during May to October of 2011 were age 55 or older, including 11% who were 65 years or older. Compared to non-resident visitors overall, visitors who reported golfing as a trip activity were more likely to be under 54 years of age.

Just over three quarters (76%) of non-resident visitors that reported golfing as a trip activity graduated university (57% with an undergraduate degree and 19% with a post-graduate degree), while less than 10% indicated a level of education less than high school. Compared to non-resident visitors in general, those who reported golfing as a trip activity were more likely to have a university degree.

Fifty eight percent of travel parties that reported golfing as a trip activity had average annual household incomes of greater than \$100,000 while only 3% reported incomes of less than \$40,000. Compared to all non-resident visitors, those who reported participating in golf were more likely to report a household income higher than \$100,000.

**Table 10**  
**2011 Non-Resident Visitors Golfing**  
**Age**

	Overall	Those Participating in Golfing
Under 35	20%	24%
35 – 44	13%	13%
45 – 54	22%	28%
55 – 64	27%	24%
65 and Over	19%	11%

**Table 11**  
**2011 Non-Resident Visitors Golfing**  
**Education**

	Overall	Those Participating in Golfing
High School or Less	9%	9%
Community/Technical College	13%	15%
University	51%	57%
Post Graduate	27%	19%

**Table 12**  
**2011 Non-Resident Visitors Golfing**  
**Household Income**

	Overall	Those Participating in Golfing
Less than \$40,000	8%	3%
\$40,000 - \$69,999	21%	16%
\$70,000 - \$99,999	22%	23%
\$100,000 or more	49%	58%