

2011 Exit Survey – Program Highlights



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



2011 Exit Survey Program Highlights

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 Argenteia) 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. Margins of error increase as sample sizes decrease.

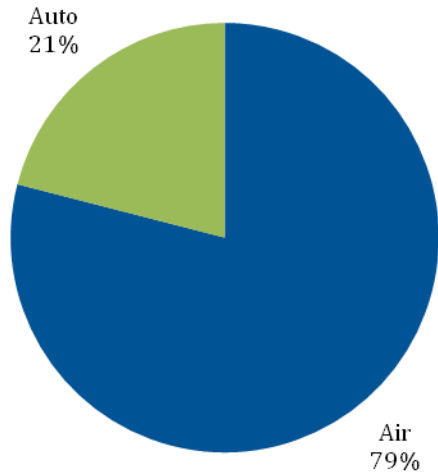
VISITATION

This **Highlights** report focuses on the peak travel season May to October.

The total estimate of non-resident visiting parties during the May to October period at the exit points included in the program is 158,456. Over three-quarters (79%) of the non-resident parties visiting during the May to October time period came by air.

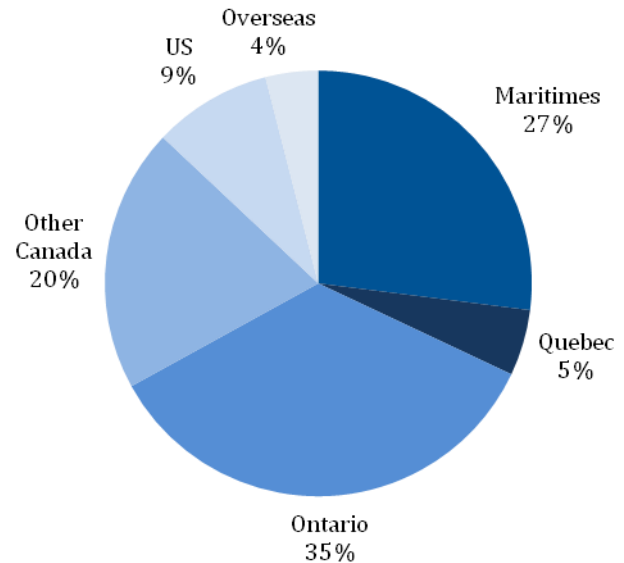
Note to readers: Unless otherwise stated, results for business travellers include those travelling for conventions/conferences.

Chart 1
2011 Non-Resident Parties
By Mode
 (% Parties – May to October)



Total Parties - 158,456

Chart 2
2011 Non-Resident Parties
By Origin
 (% Parties – May to October)



ORIGIN

Travellers from the Maritimes and Ontario make up over 60% of non-resident visiting parties to Newfoundland and Labrador.

Chart 2 presents the origins of travel parties who visited the Province in 2011. Over one third (35%) of visitors came from Ontario, representing the Province’s largest source market. With over one quarter of visitors (27%), Maritimers accounted for the second largest share of travel parties.

In terms of other markets, Quebec represented 5% of non-resident parties while 20% of visitors arrived from provinces west of Ontario and the territories. Nine percent of parties travelled from the United States while 4% were from overseas.

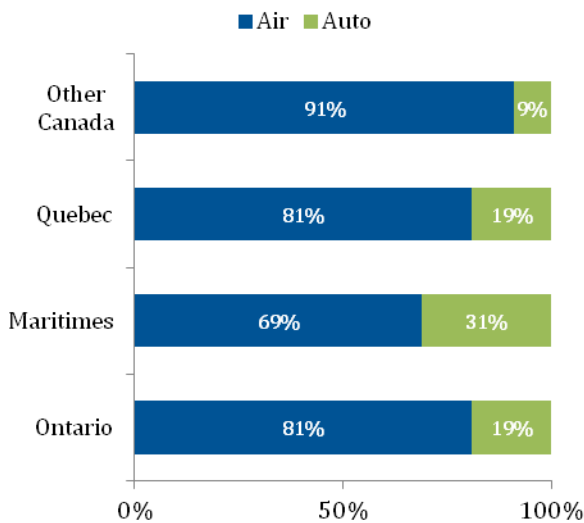
Table 2 highlights the differences in origins between the air and auto travel segments. Visitors from provinces west of Ontario and the three territories represented a far greater share of air travellers (23%) than of auto travellers (8%) while 40% of auto parties travelled from the Maritimes. Almost as many Ontarians came driving to the Province as came flying. Visitors from the US represented almost one in ten air travel parties.

Table 2
2011 Non-Resident Exiting Parties
Origin by Mode
 (May to October)

	Total % Parties	Air % Parties	Auto % Parties
Maritimes	27%	24%	40%
Quebec	5%	5%	5%
Ontario	35%	36%	32%
Other Canada	20%	23%	8%
United States	9%	8%	14%
Overseas	4%	5%	2%

Chart 3 below shows that while the majority of non-resident parties arrived to the Province by air, the proportion travelling by auto was noticeably higher among Maritimers compared to all other regions of Canada. Thirty-one percent of Maritime parties travelled here by auto compared to 19% of Ontario and Quebec parties.

Chart 3
2011 Proportion of Non-Resident Parties
By Mode and By Market: Canada
 (% Parties – May to October)

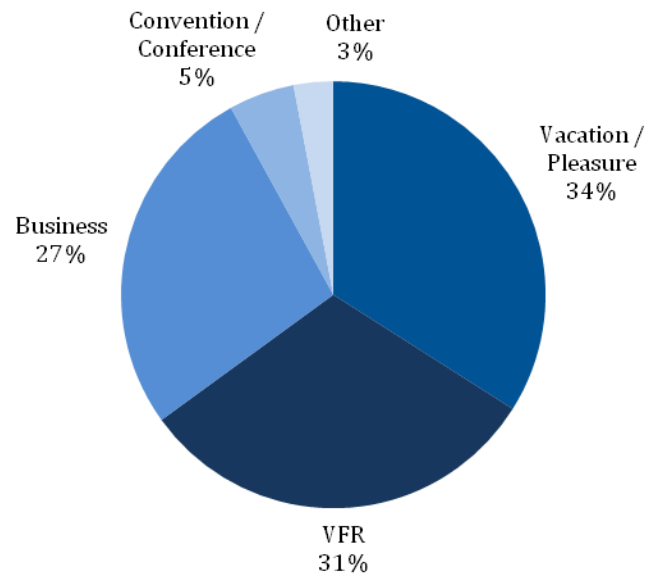


PURPOSE

Majority of non-residents continue to visit the province for leisure purposes

Thirty-four percent of non-resident parties visited the Province for vacation or pleasure, while another 31% came to visit friends and relatives (VFR). Twenty-seven percent came for business reasons and 5% came specifically to attend conventions or conferences. Three percent of non-residents indicated they came for some other reasons.

Chart 4
2011 Non-Resident Parties
By Main Reason for Trip
 (% Parties – May to October)



The auto market continues to be primarily a leisure market. As seen in **Table 3**, 54% of auto parties cited vacation or pleasure as the main reason for their trip compared to 28% of air parties. Not surprisingly, the proportion of air visitors reporting business and convention/conference as the main reason for their trip is significantly higher than the proportion among auto visitors – 32% vs. 8% for business and 6% vs. 1% for convention/conference.

Table 3
2011 Non-Resident Exiting Parties
Main Reason by Trip by Mode
 (May to October)

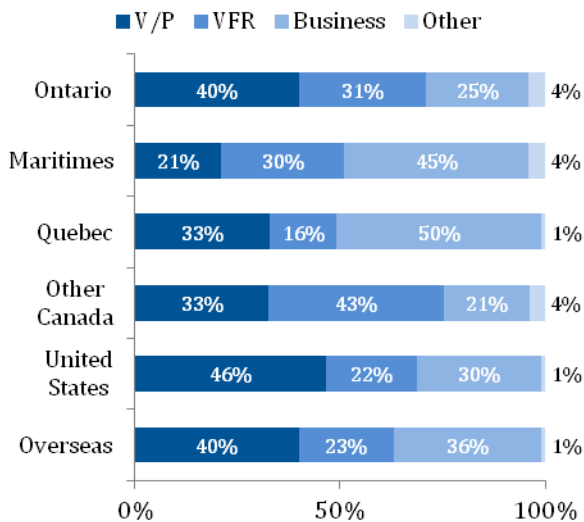
	Total % Parties	Air % Parties	Auto % Parties
Vacation/Pleasure	34%	28%	54%
VFR	31%	30%	34%
Business	27%	32%	8%
Convention / Conference	5%	6%	1%
Other	3%	3%	3%

ORIGIN BY PURPOSE

At 46%, parties from the US were the most likely to travel for vacation/pleasure while travellers from Other Canada had the highest proportion of VFR visitors (43%). Almost as many parties from Other Countries travelled for business as travelled for vacation or pleasure while half of Quebecers visited for business purposes. More Maritimers came to the province for business (45%) than did for any other purpose.

Chart 5 shows the distribution of travel parties by main purpose for each geographic market.

Chart 5
2011 Proportion of Non-Resident Parties
By Main Reason for Trip and by Market
 (% Parties – May to October)



PARTY SIZE AND COMPOSITION

Average Party Size

Overall, the average party size was 1.8 individuals. At 1.7, the average party size of air travellers is noticeably lower than that of auto parties (2.3). Also, at 1.4 individuals per party, the average business party size is considerably lower than that of travellers for

any other purpose. The average party size was highest among VFR visitors who travelled by auto.

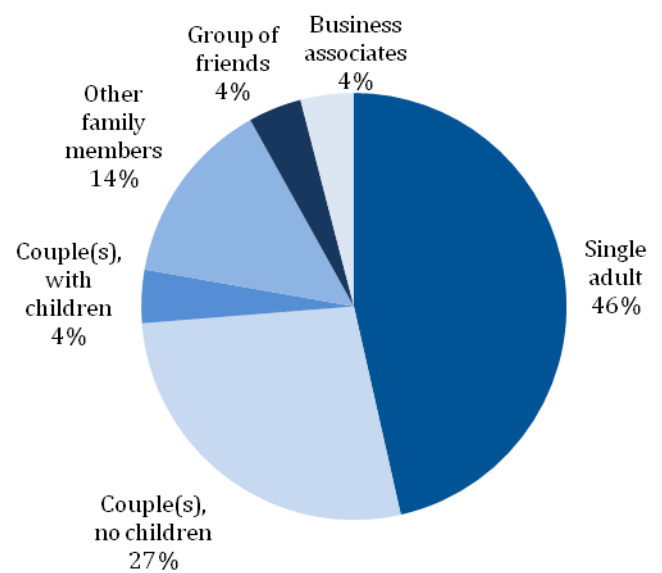
Table 4
2011 Non-Resident Exiting Parties
Average Party Size by Main Reason and Mode
 (May to October)

	Total 2011	Air 2011	Auto 2011
Overall	1.8	1.7	2.3
Vacation/Pleasure	2.2	2.0	2.4
VFR	2.0	1.8	2.5
Business	1.4	1.4	1.6

Party Composition

Almost one-half (46%) of non-resident visitors to the Province travelled as single adults. Over a quarter of travel parties consisted of couple(s) with no children (27%) – almost twice as many parties who travelled with other family members (14%).

Chart 6
2011 Non-Resident Visitors
Party Composition
 (% Parties – May to October)

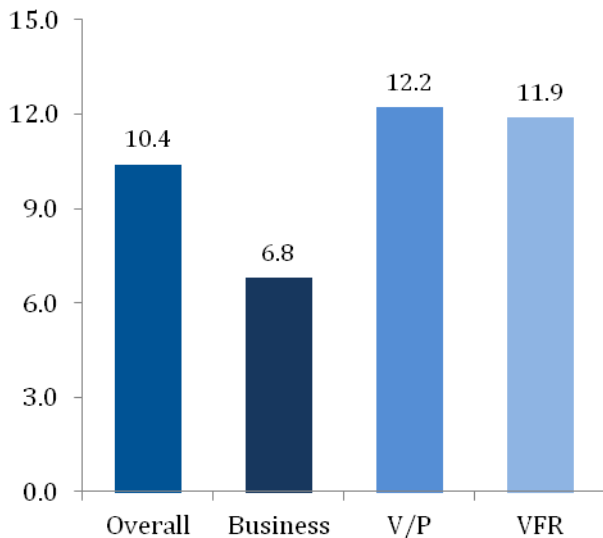


LENGTH OF STAY

Travel parties visiting for vacation or pleasure and visiting friends and relatives spent close to two weeks in the Province during their trip.

During May to October of 2011, non-residents stayed, on average, 10.4 nights in the province. The length of stay varied greatly depending on the reason for the trip, ranging from 6.8 nights for business visitors to 11.9 nights for VFR and 12.2 nights for parties visiting for vacation or pleasure purposes.

Chart 7
2011 Average Length of Stay
By Main Trip Reason
 (% Parties – May to October)



All those visiting by auto stayed longer on average than those visiting by air – 14.3 nights compared to 9.4 nights respectively. **Table 5** shows the differences in length of stay by mode of travel and trip purpose, indicating that VFR auto travellers stayed longer than anybody else while business travellers by auto stayed almost twice as long as business travellers by air.

Table 5
2011 Non-Resident Exiting Parties
Average Length of Stay by Main Reason and Mode
 (May to October)

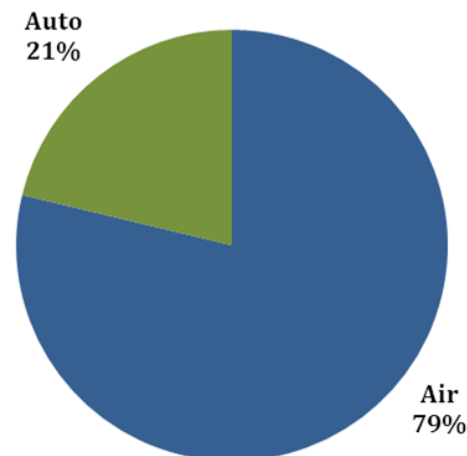
	Total 2011	Air 2011	Auto 2011
Overall	10.4	9.4	14.3
Vacation/Pleasure	12.2	11.1	14.3
VFR	11.9	11.0	14.9
Business	6.8	6.5	11.9

EXPENDITURES

Vacation/pleasure travellers are the highest yield visitors while parties visiting friends and relatives spent the least.

Non-resident survey respondents reported expenditures of \$221.6 million during the May to October period in 2011. Air parties accounted for 79% of total expenditures for that period compared to 21% for auto parties.

Chart 8
2011 Non-Resident Total Party Expenditures*
By Mode
 (% Expenditures – May to October)



Total Expenditures: \$221,621,752

Spending by non-resident visitors is a function of their length of stay in the Province and their main trip purpose. Trip purpose generally influences where visitors stay, what they do and what they buy during their stay. Overall, the average expenditure reported by a travel party was \$1,751.

Table 6 notes the differences in average spending per party by trip purpose. Overall, non-resident parties travelling for vacation/pleasure spent the most during their visit at \$2,573. This compares to \$1,214 for those visiting friends and relatives and \$1,528 for those coming for business reasons.

Table 6
2011 Non-Resident Exiting Parties
Average Expenditure by Main Reason for Trip (All Parties)
(May to October)

	Average \$ Per-Party Per-Visit		
	Total	Air	Auto
Overall	\$1,751	\$1,722	\$1,866
Vacation/Pleasure	\$2,573	\$2,691	\$2,320
VFR	\$1,214	\$1,196	\$1,277
Business	\$1,528	\$1,517	\$1,714

Generally, the average expenditure per party was very similar for air (\$1,722) and auto parties (\$1,866). However, at almost \$2,700, air travel parties visiting for vacation/pleasure spent considerably more on average than auto visitors travelling for the same purpose (\$2,320). Expenditures by those visiting friends and relatives and those travelling for business showed some differences for both modes of transportation: Auto parties visiting friends and relatives spent on average \$1,277 compared to \$1,196 for air parties while business auto parties spent \$1,714 and air business parties \$1,517.

ACCOMMODATION NIGHTS

The majority of nights by non-resident parties in the Province were spent with either relatives (28%) or at a hotel/motel (26%). In terms of other commercial accommodations, 9% of nights were spent in Bed and Breakfasts, 5% was spent at campgrounds (provincial parks, national parks and commercial or trailer parks), and 4% in Commercial Cabins or Cottages. Only 1% of nights was spent in Commercial Outfitting Camps.

Nights were also spent at houses of friends (9%), Private Cabins/Cottages (5%) or other forms of accommodations (12%), such as rental of private residences, own residences, hostels or company housing.

Table 7 shows the percentage of nights spent in the various types of accommodation by air and auto travellers. Notable differences exist in nights spent at hotels/motels and at campgrounds.

Table 7
2011 Non-Resident Travel Parties
% of Party Nights by Types of Accommodation
By Mode
(May to October)

	Total	Air	Auto
Hotel/Motel	26%	31%	14%
Commercial Cabins/Cottages	4%	4%	4%
B&B/Country Inns	9%	10%	8%
Houses of Relatives	28%	28%	28%
Houses of Friends	9%	11%	6%
Private Cabins/Cottages	5%	4%	8%
Campgrounds – All Types	6%	1%	16%
Commercial Outfitting Camps	1%	1%	1%
All Other Types of Accommodation	12%	10%	15%

DESTINATIONS

St. John's and the West Coast remain key destinations for non-resident visitors.

The areas of the Province visited by non-residents are greatly influenced by how visitors travel to the province (air versus auto). Generally, auto travellers tended to cover a greater number of destinations

across the Island during their stay while air visitors tended to travel closer to their departure location. St. John's, Gros Morne, Gander/Twillingate and Clarenville/Bonavista were the top destinations among all visitors while only few parties reported travelling to Labrador, with the Labrador Straits area being most popular, particularly among auto travellers.

Table 8
2011 Non-Resident Travel Parties
Areas of Province Visited (and stayed at least one overnight)
By Mode
 (% Parties - May to October)

	Total	Air Total	Auto Total
Zone 1: Rigolet to Nain	0.3%	0.3%	0.0%
Zone 2: Labrador West/Churchill Falls	0.5%	0.2%	1.3%
Zone 3: Happy Valley/Goose Bay/Northwest River	0.6%	0.3%	1.4%
Zone 4: Mary's Harbour to Cartwright	0.7%	0.5%	1.5%
Zone 5: Labrador Straits (L'Anse Au Clair to Red Bay)	1.9%	1.3%	4.4%
Zone 6: Viking Trail, St. Anthony South West to Plum Point, East to Roddington/Englee	12.3%	9.3%	23.9%
Zone 7: Gros Morne Area, Viking Trail North to and including Plum Point	23.2%	17.8%	43.7%
Zone 8: Deer Lake/Humber Area	12.3%	10.7%	18.5%
Corner Brook/Massey Drive	11.5%	9.4%	19.4%
Zone 9: Stephenville/Port-au-Port/Burgeo	6.0%	3.6%	15.4%
Zone 10: Port-aux-Basques/Doyles/Rose Blanche	8.2%	1.9%	32.2%
Zone 11: Baie Verte/La Scie/Green Bay	4.2%	3.4%	7.4%
Zone 12: Grand Falls Windsor Area	8.2%	5.9%	16.7%
Zone 13: Bay D'Espoir Area	0.8%	0.5%	2.0%
Zone 14: Gander/Twillingate East to Terra Nova	21.7%	17.1%	38.3%
Zone 15: Clarenville/Bonavista Peninsula Area	18.7%	17.2%	24.8%
Zone 16: Burin Peninsula	3.3%	2.7%	5.7%
Zone 17: North West Avalon	8.2%	8.0%	8.7%
Zone 18: Argentia/Placentia Area	5.4%	4.9%	7.4%
Zone 19: North East Avalon (Excluding St. John's and Mount Pearl)	8.6%	8.6%	8.7%
St. John's CMA (including Mount Pearl)	66.3%	71.9%	44.8%
Zone 20: Southern Shore Area	5.0%	5.0%	5.0%

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. It should also be noted 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

Scenic touring and pleasure walking are top nature and outdoor activities.

Activities travellers participated in were closely linked to their method of travel. However, regardless of how people got here, scenic touring and pleasure walking exhibited the highest levels of participation – 67% of

all travel parties did some scenic touring while 64% mentioned pleasure walking in/around communities.

Table 9 shows the varying participation levels in some activities between auto and air travellers, implying that auto travellers appear to have had a greater opportunity, for instance, to observe wildlife and icebergs. As well, visiting a national or provincial park as well as hiking, whale watching and iceberg viewing continue to be most popular.

Table 9
2011 Non-Resident Travel Parties
Participation in Nature and Outdoor Activities
By Mode
(% Parties - May to October)

	Total	Air Total	Auto Total
Scenic touring	67%	66%	70%
Pleasure walking in/around communities	64%	64%	62%
Visit a National Park	34%	31%	47%
Trail hiking	32%	31%	37%
Visit a Provincial Park and/or Ecological Reserve	30%	28%	38%
Whale watching	28%	27%	32%
Sightseeing boat tour	27%	25%	31%
Wildlife viewing	22%	18%	34%
Iceberg viewing	21%	17%	37%
Hiking in wilderness areas	21%	20%	25%
Bird watching	21%	20%	25%
Guided tours	11%	11%	12%
Visit a nature park	11%	11%	12%
Geological tour/fossil observation	8%	8%	9%
Fishing (other than guided trip)	8%	7%	11%
Berry picking	7%	6%	10%
Botanical garden/plant observation	7%	6%	7%
Golfing	6%	6%	5%
Sea kayaking	3%	3%	3%
All Terrain Vehicle (ATV) touring	3%	3%	4%
Fishing (guided trip)	2%	2%	3%
Freshwater canoeing/kayaking/rafting	2%	2%	3%
Cycling	2%	2%	2%
Hunting - big game (black bear, moose, caribou)	1%	1%	3%
Mountain biking	1%	1%	1%
Hunting - small game and birds	1%	1%	0%

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.

Craft / gift shops and historic sites are the top places visited by non-resident visitors.

Visiting craft / gift shops and National Historic Sites were the top two activities at 54% and 50% respectively among non-resident visitors. Other top activities included visiting lighthouses (44%), Provincial Historic Sites (38%), Museums (37%), Visitor Information Centres (37%), other shopping (36%), Galleries and Exhibits (34%) and nightclubs

(32%). There was some variation in the places visited depending on the mode of travel. Auto parties were much more likely to visit a Visitor Information Centre compared to air travelers (54% vs. 32%). On the other hand, air parties were more likely to visit a nightclub compared to their auto counterparts (35% vs. 21%).

The percentages of parties visiting attractions or attending events are presented in **Table 10**.

Table 10
2011 Non-Resident Travel Parties
Participation in Other Activities During Visit
By Mode
(% Parties - May to October)

	Total	Air Total	Auto Total
Craft / gift shops	54%	52%	61%
National Historic Sites	51%	49%	55%
Lighthouses	44%	43%	50%
Provincial Historic Sites	38%	38%	38%
Museums / Archives	37%	37%	39%
Visitor Information Centers	37%	32%	54%
Other shopping	36%	35%	40%
Galleries/ Exhibits	34%	35%	30%
Nightclubs / lounges / pubs	32%	35%	21%
Interpretation / Science Centers	25%	23%	29%
Live performing music presentations / concerts	21%	21%	19%
Local festivals / events	16%	16%	17%
Archaeological sites	16%	15%	20%
Other historic sites	15%	15%	17%
Live performing theatre presentations / plays or dinner theatres	11%	11%	12%
Historic event celebration	4%	4%	4%
Sports events / tournaments	3%	3%	2%
Genealogical searches / other research	2%	2%	2%
Visit the French Islands of St. Pierre & Miquelon	2%	2%	3%
Spa visit	2%	2%	2%
Come Home Year Celebration	1%	1%	1%

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

DEMOGRAPHICS

Non-resident visitors to Newfoundland and Labrador tend to be older, well-educated and affluent.

Almost half (46%) of non-resident visitors to the Province during May to October of 2011 were age 55 or older, including almost one in five travellers who were 65 years or older. One quarter of visitors was between the ages of 18 and 44.

Seventy-eight percent of non-resident visitors graduated university (51% with an undergraduate degree and 27% with a post-graduate degree), while less than 10% indicated a level of education less than high school.

One-half of travel parties had average annual household incomes of greater than \$100,000 while only 8% reported incomes of less than \$40,000.

Chart 9
2011 Non-Resident Visitors
Age
 (May to October)

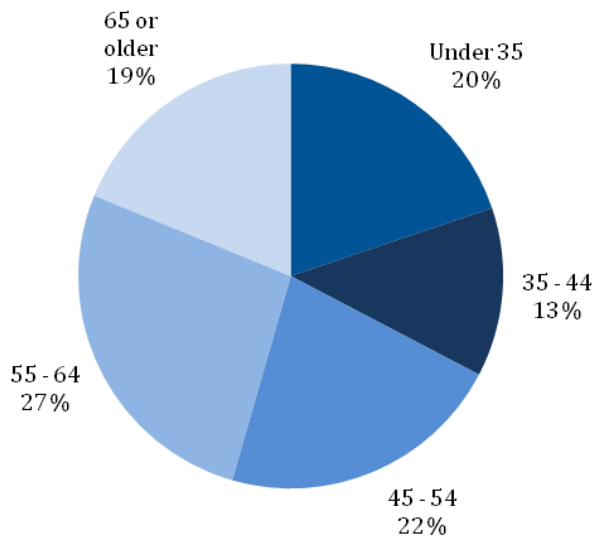


Chart 10
2011 Non-Resident Visitors
Education
 (May to October)

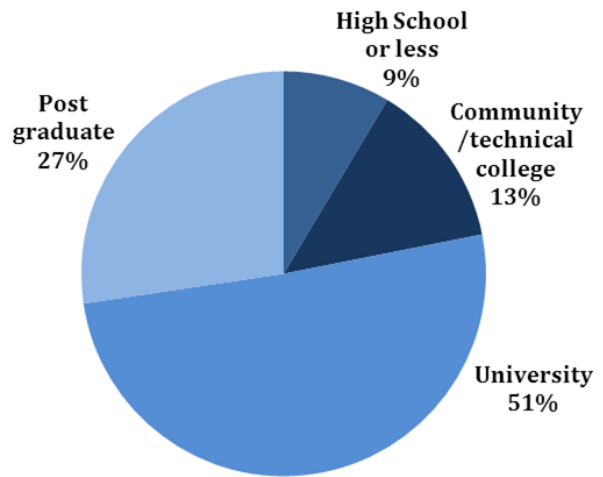


Chart 11
2011 Non-Resident Visitors
Household Income
 (May to October)

