

# 2011 Exit Survey – Profile of Non-resident Trail Hikers



Sea Arch @ Berry Head,  
Spurwink Island Trail, East Coast Trail  
Photo by: Janny Van Houwelingen



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Labrador  
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Recreation

# 2011 Exit Survey – Profile of Non-resident Trail Hikers

## 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 Trail Hikers

**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 trail hiking 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 one third (32%) reporting they participated in trail hiking as an activity. It is estimated that between May and October 2011 approximately 50,883 travel parties or 109,932 non-resident visitors participated in trail hiking as a trip activity.

## MODE OF TRAVEL

Over three-quarters (76%) of the non-resident parties reporting trail hiking as an activity came to the province by air. Compared to the overall, visiting parties participating in trail hiking are slightly more likely to have travelled to the province by automobile (24% versus 21%)

**Table 1**  
**2011 Non-Resident Parties Trail Hiking**

### By Mode

(% Parties – May to October)

	Overall %Parties	Those Participating in Trail Hiking % Parties
Airline Visitors	79%	76%
Automobile Visitors	21%	24%

Compared to the non-resident travellers overall, parties participating in trail hiking as an activity during their visit to the province were less likely to be from the Maritimes.

**Table 2**  
**2011 Non-Resident Parties Trail Hiking**  
**By Origin**

(% Parties – May to October)

	Overall %Parties	Those Participating in Trail Hiking % Parties
Maritimes	27%	16%
Quebec	5%	7%
Ontario	35%	42%
Other Canada	20%	20%
United States	9%	12%
Overseas	4%	3%

## ORIGIN

***Travellers from Ontario and Other Canada make up almost 62% of non-resident trail hikers to Newfoundland and Labrador.***

**Table 2** presents the origins of travel parties who visited the Province and reported trail hiking in 2011. Over two fifths (42%) of trail hikers came from Ontario; representing the Province's largest source market. With about one fifth of trail hikers (20%), residents of other Canada accounted for the second largest share of travel parties participating in trail hiking.

In terms of other markets, Quebec represents 7% of non-resident parties reporting trail hiking as an activity while 16% of trail hikers arrived from the Maritimes. Twelve percent of trail hikers travelled from the United States while 3% were from overseas.

## PURPOSE

***The majority of non-resident parties participating in trail hiking are visiting the province for vacation/pleasure purposes***

As can be seen in the table presented on the next page, one half (51%) of non-resident parties participating in trail hiking as an activity were visiting the Province for vacation or pleasure, while another 31% came to visit friends and relatives (VFR).

Five percent came to attend a convention or conference and 11% for business reasons. Only 2% of visitors participating in trail hiking as an activity came for some other reasons.

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

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

	Overall %Parties	Those Participating in Trail Hiking % Parties
Vacation/Pleasure	34%	51%
VFR	31%	31%
Business	27%	11%
Convention/Conference	5%	5%
Other Reasons	3%	2%

## PARTY SIZE & PARTY COMPOSITION

### Average Party Size

The average party size for parties participating in trail hiking was 2.2 individuals. Compared to travellers overall, parties participating in trail hiking are slightly larger.

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

	Overall	Those Participating in Trail Hiking
Average Party Size	1.8	2.2

### Party Composition

One third (33%) of non-resident parties participating in trail hiking consisted of couple(s) with no children, while 19% travelled with other family members. An additional one third (34%) of those who participated in trail hiking travelled alone.

Compared to non-resident travellers in general, parties participating in trail hiking were more likely to be travelling as couple(s) without children and less likely to be travelling alone.

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

	Overall %Parties	Those Participating in Trail Hiking % Parties
Alone	46%	34%
Couple(s), no children	27%	33%
Couple(s), with children	4%	6%
Other Family	14%	19%
Group of Friends	4%	6%
Business Associates	4%	1%

## LENGTH OF STAY

### *Travel parties participating in trail hiking 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 trail hiking as a trip activity stayed slightly longer (an additional two nights) at 12.7 nights

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

	Overall	Those Participating in Trail Hiking
Average Stay	10.4	12.7

## EXPENDITURES

***Travellers participating in trail hiking as a trip activity report higher than average in-province expenditures.***

Non-resident travel parties participating in trail hiking as a trip activity reported an average in-province per party expenditure of \$2,213 and an average in-province per person expenditure of \$1,102. On a per person per night basis travel parties reporting trail hiking reported an average in province expenditure of \$120.

Compared to all non-resident travel parties, parties participating in trail hiking reported higher than average in-province per party and per person expenditures. Specifically per party and per person expenditures are 26% and 15% higher than the overall average

Given the slightly larger party size and longer length of stay in the province for parties participating in trail hiking, the person per night expenditure level is somewhat lower (-12%) than the overall average

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

	Overall	Those Participating in Trail Hiking
Average per Party Expenditure	\$1,751	\$2,213
Average per Person Expenditure	\$960	\$1,102
Average per person per Night Expenditure	\$137	\$120

## ACCOMMODATION NIGHTS

The largest share of nights by non-resident parties participating in trail hiking was spent in a hotel/motel (22%) followed closely by nights spent with relatives (21%). In terms of other commercial accommodations, 14% of nights of those participating in trail hiking were spent in B&Bs/Country Inns and 9% in national, provincial or private campgrounds.

Compared to all travellers, non-resident parties participating in trail hiking were more likely to stay in a B&B/Country Inn. In addition almost 6 in 10 nights (58%) spent by those participating in trail hiking were spent in paid accommodations. This compares to 53% for all travellers.

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

	Overall % of Nights	Those Participating in Trail Hiking % of Nights
Hotel/Motel	26%	22%
Commercial Cabins/Cottages	4%	5%
B&B/Country Inns	9%	14%
Houses of Relatives	28%	21%
Houses of Friends	9%	11%
Private Cabins/Cottages	5%	6%
Campgrounds – All Types	6%	9%
All Other Types of Accommodation	12%	12%

## DESTINATIONS

***St. John's and the Gros Morne/Viking Trail are key destinations for non-resident visitors participating in trail hiking.***



*Gros Morne National Park*



*East Coast Trail*

The most popular areas of the Province visited by non-residents participating in trail hiking include the St. John's CMA, Gros Morne/Viking Trail area, Gander/Twillingate east to Terra Nova and the Clarenville/Bonavista Peninsula.

Compared to all non-resident visitors, travel parties participating in trail hiking as a trip activity reported higher than average party visits to many of the rural destinations areas of the province and lower than average party visits to the NE Avalon/St. John' area.

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

	Overall	Those Participating in Trail Hiking
Zone 1: Rigolet to Nain	0.3%	0.3%
Zone 2: Labrador West/Churchill Falls	0.5%	0.4%
Zone 3: Happy Valley/Goose Bay/Northwest River	0.6%	0.5%
Zone 4: Mary's Harbour to Cartwright	0.7%	1.1%
Zone 5: Labrador Straits (L'Anse Au Clair to Red Bay)	1.9%	2.4%
Zone 6: Viking Trail, St. Anthony South West to Plum Point, East to Roddington/Englee	12.3%	21.9%
Zone 7: Gros Morne Area, Viking Trail North to and including Plum Point	23.2%	43.3%
Zone 8: Deer Lake/Humber Area	12.3%	14.7%
Corner Brook/Massey Drive	11.5%	12.6%
Zone 9: Stephenville/Port-au-Port/Burgeo	6.0%	7.6%
Zone 10: Port-aux-Basques/Doyles/Rose Blanche	8.2%	11.0%
Zone 11: Baie Verte/La Scie/Green Bay	4.2%	5.9%
Zone 12: Grand Falls Windsor Area	8.2%	9.5%
Zone 13: Bay D'Espoir Area	0.8%	0.8%
Zone 14: Gander/Twillingate East to Terra Nova	21.7%	29.6%
Zone 15: Clarenville/Bonavista Peninsula Area	18.7%	26.9%
Zone 16: Burin Peninsula	3.3%	4.0%
Zone 17: North West Avalon	8.2%	8.6%
Zone 18: Argentia/Placentia Area	5.4%	7.2%
Zone 19: North East Avalon (Excluding St. John's and Mount Pearl)	8.6%	7.8%
St. John's CMA (including Mount Pearl)	66.3%	64.0%
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-resident visitors reporting participation in trail hiking in Newfoundland and Labrador is very similar to that of non-resident visitors overall.*

Forty-two percent of non-resident visitors to the Province who participated in trail hiking during May to October of 2011 were age 55 or older, including 15% who were 65 years or older. Compared to travellers in general, non-resident visitors who reported trail hiking as a trip activity were more likely to be under 35 years of age and less likely to be 65 or older.

Eighty five percent of non-resident visitors who reported trail hiking as a trip activity graduated university (51% with an undergraduate degree and 34% with a post-graduate degree), while 6% indicated a level of education less than high school. Compared to all visitors, non-resident visitors who reported trail hiking as a trip activity were more likely to have a post-graduate degree.

One-half (49%) of travel parties that reported trail hiking as a trip activity had average annual household incomes of greater than \$100,000 while only 10% reported incomes of less than \$40,000.

**Table 10**  
**2011 Non-Resident Visitors Trail Hiking**  
**Age**

	Overall	Those Participating in Trail Hiking
Under 35	20%	26%
35 – 44	13%	11%
45 – 54	22%	21%
55 – 64	27%	27%
65 and Over	19%	15%

**Table 11**  
**2011 Non-Resident Visitors Trail Hiking**  
**Education**

	Overall	Those Participating in Trail Hiking
High School or Less	9%	6%
Community/Technical College	13%	9%
University	51%	51%
Post Graduate	27%	34%

**Table 12**  
**2011 Non-Resident Visitors Trail Hiking**  
**Household Income**

	Overall	Those Participating in Trail Hiking
Less than \$40,000	8%	10%
\$40,000 - \$69,999	21%	22%
\$70,000 - \$99,999	22%	19%
\$100,000 or more	49%	49%