

2003–2004
EXIT SURVEY
Program Highlights

GOVERNMENT OF NEWFOUNDLAND AND LABRADOR — DEPARTMENT OF TOURISM, CULTURE AND RECREATION



EXIT SURVEY

Program Highlights

PROJECT OVERVIEW

The 2003-2004 Exit Survey served to update and enhance existing historical information on non-resident visitors to this Province. Under the direction of the Department of Tourism, Culture and Recreation (hereafter referred to as the Department), the survey was broadened to cover a 12-month period and used a methodology that could provide a look at the non-resident visitor regardless of whether that visitor travelled to the Province by air or vehicle. The revised program was undertaken to improve annual estimates of visitation and expenditure as well as update visitor characteristics. In addition to standard visitor characteristics, the survey program also involved a follow-up survey with non-resident leisure visitors to provide additional insight on visitors' motivations, attitudes, perceptions and opinions related to various aspects of our Tourism offering.

METHODOLOGY

Surveys were conducted with individuals leaving the Province through major exit points – Port-aux-Basques, Argentia and St. John's. The 2003-2004 Exit Survey Program covered all vehicle-related exit points from the island portion of the province and the major air exit point — St. John's, which represented 70% of all air boarding passengers leaving the Province.

At each exit point a short survey was administered using palm pilot technology to gather key information and identify non-resident visitors exiting the Province. A longer questionnaire was also administered through in-person interviews at the St. John's airport using the palm pilot technology and

distributed to individuals for self-completion and mail-back at Port-aux-Basques and Argentia. This longer survey provided non-resident visitor profile and activity information.

During the reporting period of June to October, a total of 20,787 surveys were conducted with non-residents exiting the Province. A detailed weighting system was applied to ensure the collected sample reflected the exiting non-resident population. **Table 1** shows the breakdown of surveys collected.

TABLE — I

2003-2004 EXIT SURVEY PROGRAM

NUMBER OF NON-RESIDENTS SURVEYED
(JUNE TO OCTOBER)

Survey	Air	Auto	Total
Short	3,678	11,607	15,285
Long	1,482	4,020	5,502
Totals	5,160	15,627	20,787

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 samples decrease, thus the margin of error for the full sample will be less than the margin of error for various subgroups reported.

Given the changes to the methodology in 2003-2004, this survey represents a new benchmark for results. Therefore, comparisons to previous surveys should be undertaken with caution.

THE HIGHLIGHTS

Non-resident visitors include those individuals who visit for business, vacation or pleasure, to visit friends or relatives, or for personal reasons. The following highlights are reported for non-resident parties and represent results for the reporting time period June to October.

VISITATION AND EXPENDITURES

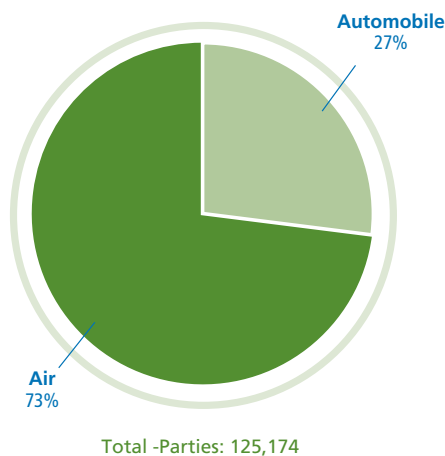
The total estimate of non-resident visiting parties during the June to October period, using the primary exit points included in the program is 125,174. Expenditures were estimated at \$166.5 million for these same parties and period.

Almost three quarters (73%) of the non-resident party visits during the June to October time period were made by air travellers. Similarly, air parties also accounted for 71% of total expenditures during the period.

CHART — I

2004 NON-RESIDENT PARTIES* BY MODE

(% PARTIES - JUNE TO OCTOBER)

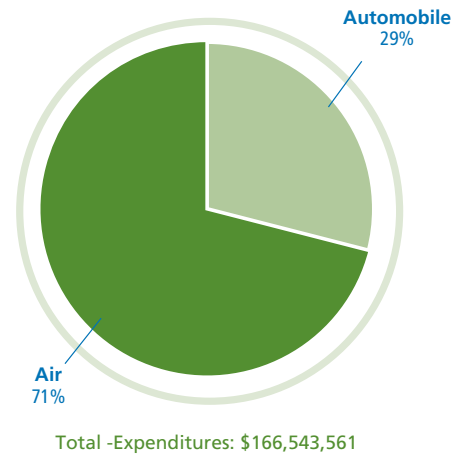


* Source: Department Estimates for province, Exit Survey Data Auto and St. John's Air Combined

CHART — 2

2004 NON-RESIDENT TOTAL PARTY EXPENDITURES* BY MODE

(% EXPENDITURES - JUNE TO OCTOBER)



* Source: Department Estimates for province, Exit Survey Data Auto and St. John's Air Combined

ORIGIN

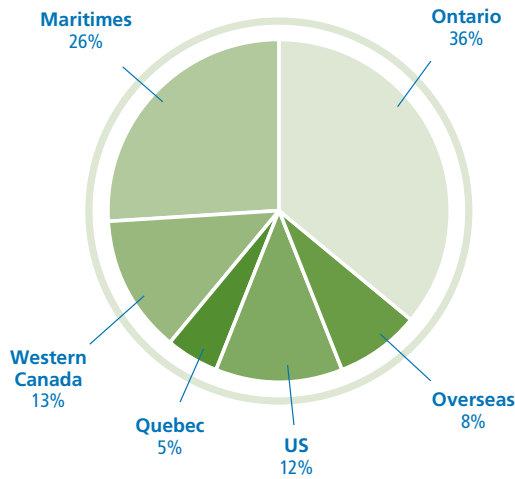
Main markets are still the Maritimes and Ontario.

As presented in **Chart 3** the majority of non-resident parties (62%) came from the primary target markets of Ontario and the Maritimes. Specifically 36% of all non-resident visiting parties came from Ontario and another 26% came from the Maritimes. In terms of other markets, residents of Western Canada accounted for 13% of parties while residents of Quebec accounted for 5%. Residents of the United States represented 12% while overseas residents accounted for 8% of non-resident parties.

CHART —3

2004 NON-RESIDENT PARTIES* BY ORIGIN

(% PARTIES - JUNE TO OCTOBER)



* Source: Department Estimates for province, Exit Survey Data Auto and St. John's Air Combined

In terms of the air and auto market, it is interesting to note that the Maritimes represents a smaller portion of parties travelling by air. As can be seen in **Table 2**, 22% of air travellers came from the Maritimes compared to over 1/3 (35%) of auto parties travelling from this market. Parties travelling from Western Canada represent a greater proportion of the air market compared to the auto market (15% versus 8% of the auto market).

TABLE —2

2004 NON-RESIDENT EXITING PARTIES ORIGIN BY MODE

(JUNE TO OCTOBER)

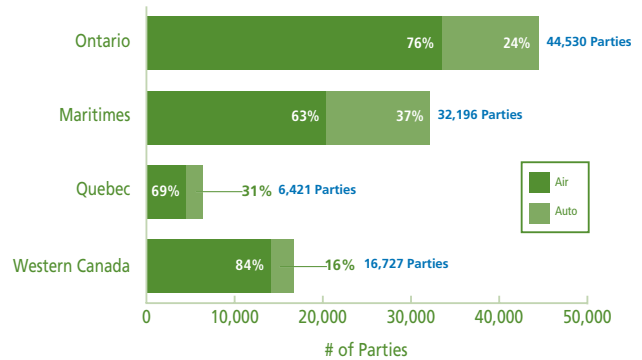
	Total % Parties	St. John's Air % Parties	Auto % Parties
Maritimes	26%	22%	35%
Ontario	36%	37%	32%
Quebec	5%	5%	6%
Western Canada	13%	15%	8%
United States	12%	11%	17%
Overseas	8%	10%	2%

As seen in **Chart 4** below, while the majority of non-resident parties arrived to the Province by air, the proportion travelling by auto was noticeably higher among Maritimers. Thirty-seven percent of Maritime parties travelled here by auto compared to 24% of Ontario parties. In terms of absolute numbers, there were also more auto parties from the Maritimes compared to Ontario (11,913 versus 10,687 parties from Ontario).

CHART —4

2004 PROPORTION OF NON-RESIDENT PARTIES* BY MODE AND BY MARKET: CANADA

(% PARTIES - JUNE TO OCTOBER)



* Source: Exit Survey Data Auto and St. John's Air Combined

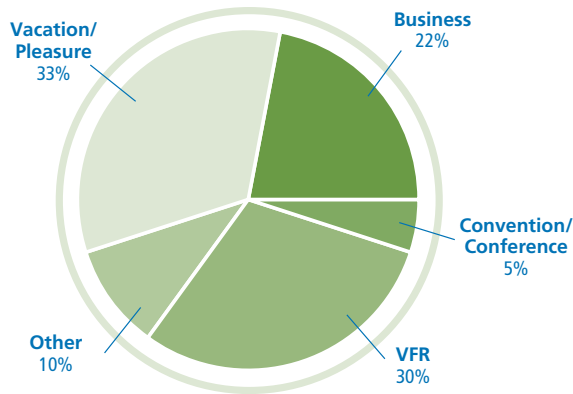
PURPOSE

Majority of non-resident visitors came for leisure purposes.

Thirty-three percent of non-resident parties visited the Province for vacation or pleasure (V/P), while another 30% came to visit friends and relatives (VFR). Twenty-two percent came for business reasons and 5% came specifically to attend a convention or conference.

CHART —5

2004 NON-RESIDENT PARTIES* BY MAIN REASON FOR TRIP
(% PARTIES - JUNE TO OCTOBER)



* Source: Exit Survey Data Auto and St. John's Air Combined

Looking at the auto and air markets, the auto market is predominantly a leisure market and, as noted below in **Table 3**, had a higher proportion of parties who cited the main reason for their trip to be for vacation or pleasure – 48% compared to 28% of air parties. Not surprisingly the proportion of air visitors reporting business as the main reason for their trip is significantly higher than the proportion of auto visitors – 34% compared to 5%.

TABLE —3

2004 NON-RESIDENT EXITING PARTIES MAIN REASON FOR TRIP BY MODE
(JUNE TO OCTOBER)

	Total % Parties	St. John's Air % Parties	Auto % Parties
Vacation/Pleasure	33%	28%	48%
VFR	30%	28%	35%
Business	27%	34%	5%

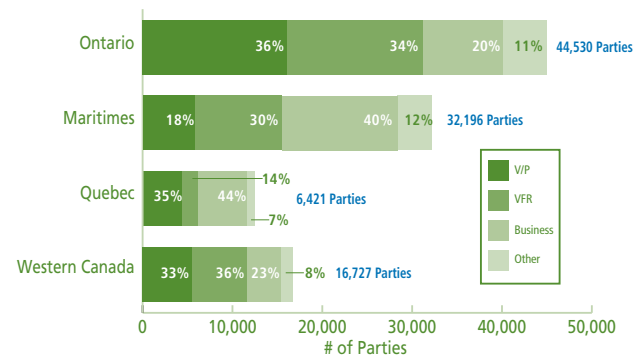
ORIGIN BY PURPOSE

Within the two primary markets, 68% of Ontario parties came for leisure purposes (34% for vacation/pleasure and 34% to visit friends or relatives) compared to 48% of Maritime parties

who came for leisure (18% for vacation/pleasure and 30% to visit friends and relatives). The Western Canadian market also demonstrates a high leisure component with 69% of parties identifying the main reason for their trip to be for either vacation or pleasure (33%) or to visit friends or relatives (36%). The Quebec market shows a high proportion travelling here for business reasons – 44% of parties.

CHART —6

2004 PROPORTION OF NON-RESIDENT PARTIES* BY MAIN REASON FOR TRIP AND BY MARKET: CANADA
(% PARTIES - JUNE TO OCTOBER)



* Source: Exit Survey Data Auto and St. John's Air Combined

As seen in **Chart 7**, the US market is generally a leisure market. The majority of those parties visiting from the North Eastern US (74%) and the remainder of the US (78%) cited the main reason for their trip as vacation/pleasure or to visit friends and relatives. While the overseas market is also primarily a leisure market, there is a higher proportion of visiting parties who cited coming here on business (29%).

CHART —7

2004 PROPORTION OF NON-RESIDENT PARTIES* BY MAIN REASON FOR TRIP AND BY MARKET: INTERNATIONAL
(% PARTIES - JUNE TO OCTOBER)



* Source: Exit Survey Data Auto and St. John's Air Combined

PARTY SIZE AND COMPOSITION

Average Party Size

Overall, the average party size was 1.9 individuals. As expected, the average air party size is lower than that of auto parties – 1.7 compared to 2.5 people per party. Also, as expected, the average business party size is lower than that of leisure parties – reporting at 1.4 individuals per party.

TABLE —4

**2004 NON-RESIDENT EXITING PARTIES
AVERAGE PARTY SIZE BY MAIN REASON AND MODE**
(JUNE TO OCTOBER)

	Total 2004	St. John's Air 2004	Auto 2004
Overall	1.9	1.7	2.5
Vacation/ Pleasure	2.1	2.0	2.4
VFR	2.0	1.7	2.7
Business	1.4	1.4	1.9

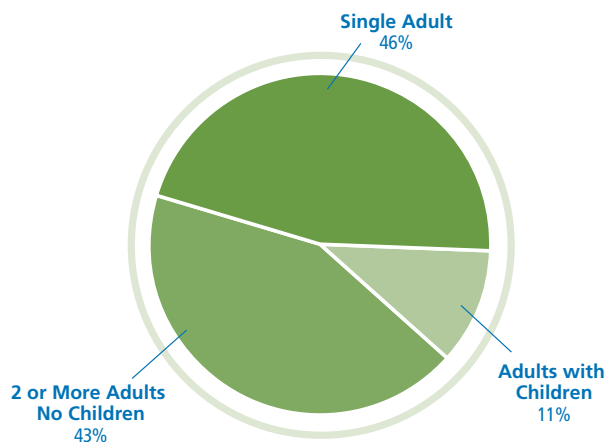
Party Composition

Almost all non-resident parties (89%) travel to the Province as single adults or with other adults. Only 11% of parties travelled with children.

CHART —8

**2004 NON-RESIDENT VISITORS*
PARTY COMPOSITION**

(% PARTIES - JUNE TO OCTOBER)



* Source: Exit Survey Data Auto and St. John's Air Combined

LENGTH OF STAY

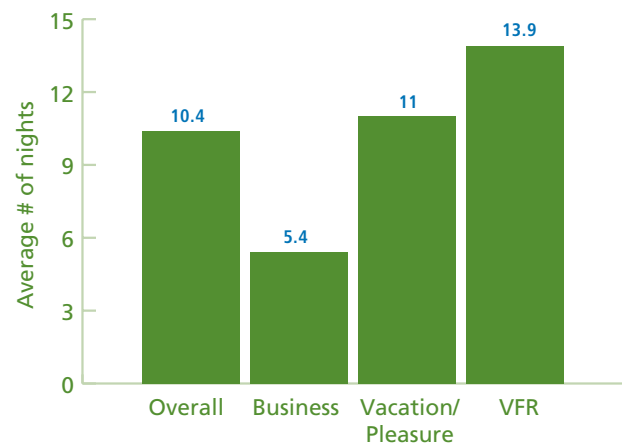
Province maintains high average length of stay per visit at almost two weeks for vacation/pleasure visitors.

During June to October, non-residents stayed, on average, 10.4 nights. The length of stay varied greatly depending upon the reason for the trip, ranging from 5.4 nights for business visitors to 11 nights for vacation and pleasure visitors to a high of 13.9 nights for those visiting friends and relatives. All those visiting by auto stayed longer on average than those visiting by air – 13.6 nights compared to 9.3 nights respectively. As seen in **Table 5** the least noted difference in length of stay by mode of travel was noted for those visiting friends and relatives – 14.6 nights on average for auto parties and 13.6 nights for air parties.

CHART —9

**2004 AVERAGE LENGTH OF STAY*
BY MAIN TRIP REASON**

(# PARTY OVERNIGHTS: JUNE TO OCTOBER)



* Source: Exit Survey Data Auto and St. John's Air Combined

TABLE —5

2004 NON-RESIDENT EXITING PARTIES
AVERAGE LENGTH OF STAY BY MAIN REASON AND MODE
 (JUNE TO OCTOBER)

	Total 2004	St. John's Air 2004	Auto 2004
Overall	10.4	9.3	13.6
Vacation/ Pleasure	11.0	10.3	12.1
VFR	13.9	13.6	14.6
Business	5.4	5.1	12.4

EXPENDITURES

Vacation Pleasure visitors spent the most during their visits, but business visitors spent, on average, more per-person per-night.

The economic impact of non-resident visitors is a function of their length of stay in the Province and their level of daily expenditure. The level of daily expenditure is in turn influenced by where they stay and what they buy, or do, during their stay. Overall, the average expenditure reported by a party during their stay in the Province was \$1,322. This translates into a total of \$826 **per-person per-visit** and \$130 **per-person per-night**.

As presented in **Table 6A** non-resident parties travelling for vacation/ pleasure spent the most during their visit, spending, on average, \$1,758, compared to \$1,058 for those visiting friends and relatives and \$1,148 for those coming for business reasons. On a **per-person per-night** basis, a visitor who came for vacation/ pleasure purposes, spent, on average just over \$100 per person per night and someone who came to visit friends or relatives spent, on average \$68 per-person per-night. Business visitors reported the highest per-person per-night expenditure at \$235.

TABLE —6A

2004 NON-RESIDENT EXITING PARTIES
AVERAGE EXPENDITURE BY MAIN REASON FOR TRIP (ALL PARTIES)
 (JUNE TO OCTOBER)

	Average \$ Per Party Per Visit	Average \$ Per Person Per Visit	Average \$ Per Person Per Night
Overall	\$1,322	\$826	\$130
Vacation/ Pleasure	\$1,758	\$899	\$101
VFR	\$1,058	\$652	\$68
Business	\$1,148	\$950	\$235

As seen in **Table 6B**, an auto party spent more per visit, on average, than an air party. The average trip expenditure for an **auto** party was \$1,446 compared to \$1,289 for an air party. However, for leisure visitors (those travelling for vacation/pleasure purposes or to visit friends or relatives), the average per party expenditure for the trip was very similar regardless how they travelled to the Province. An **air vacation/pleasure** party spent, on average, \$1,772 during the entire trip, compared to \$1,729 for an **auto party** travelling for vacation/pleasure purposes. Similarly, those who visited Newfoundland and Labrador by air or auto to visit friends or relatives spent similar amounts during their visit – on average, \$1,043 was spent by a VFR party travelling by air and \$1,101 was spent by a VFR party travelling by auto to the Province.

Given that those visiting by air tend not to stay as long in the Province (i.e. shorter average length of stay) and tend to be smaller party sizes, it is interesting to note that, on a **“per-person, per-night”** basis, an air visitor spent almost twice as much as an auto visitor. An air visitor spent, on average, \$144 per-person per-night compared to \$77 per-person per-night spent by an auto visitor.

TABLE — 6B

**2004 NON-RESIDENT EXITING PARTIES
AVERAGE EXPENDITURE BY MAIN REASON FOR TRIP AND MODE
(JUNE TO OCTOBER)**

	St John's Air Total	St. John's Air			Auto Total	Auto		
		V/P	VFR	Bus		V/P	VFR	Bus
Average \$ per Party	\$1,289	\$1,772	\$1,043	\$1,137	\$1,446	\$1,729	\$1,101	\$1,460
Average \$ per Person	\$868	\$955	\$704	\$949	\$670	\$783	\$496	\$988
Average \$ per Person per Night	\$144	\$106	\$75	\$238	\$77	\$90	\$48	\$164

As seen in **Table 7A**, accommodation, transportation and restaurant expenditures account for the majority of all non-resident expenditures made in the Province during the June to October period – representing over three-quarters (76.7%) of all expenditures made by all visiting parties. This pattern is the same for both air and auto visitors; however, air parties spent a higher proportion of dollars on accommodation (32%) compared to auto parties where these expenditures accounted for almost 20% of all in-province expenditures made by auto parties. On the other hand, auto parties spent a higher proportion of their dollars on transportation-related items compared to air parties – 35% of all expenditures made by auto parties related to transportation compared to only 22% for air parties.

TABLE — 7A

**2004 NON-RESIDENTS
CATEGORY SHARE OF TOTAL IN-PROVINCE EXPENDITURES BY MODE
(% TOTAL EXPENDITURES-JUNE TO OCTOBER)**

	Total	St. John's Air	Auto
Transportation	25.6%	22.4%	35.1%
Accommodation	29.1%	32.2%	19.8%
Restaurants	22.0%	23.9%	16.2%
Souvenirs	9.0%	8.9%	9.5%
Groceries	6.9%	6.2%	9.0%
Entertainment	4.7%	4.1%	6.4%
Other	2.7%	2.3%	4.0%

Looking at **Table 7B**, the contribution of various expense categories to the overall Provincial economy based on the main reason for the trip there are a number of significant differences noted. Almost half of all expenditures made by business parties were for accommodations while 28% of total expenditures by vacation/pleasure visitors and only 11% for those visiting friends and relatives were in this area. Transportation-related items represented a similar share of total expenses made by leisure visitors (28% of all vacation/pleasure party expenditures and 29% of VFR party expenditures). A greater share of VFR expenditures was made on groceries compared to other groups (15% compared to 6% of vacation/pleasure expenditures and only 2% of business party expenditures.)

TABLE — 7B

**2004 NON-RESIDENTS
CATEGORY SHARE OF TOTAL IN-PROVINCE EXPENDITURES BY MAIN REASON FOR TRIP
(% TOTAL EXPENDITURES-JUNE TO OCTOBER)**

	Total	VFR	V/P	Business
Transportation	25.6%	29.2%	28.2%	17.5%
Accommodation	29.1%	10.8%	28.2%	48.9%
Restaurants	22.0%	22.6%	20.4%	23.6%
Souvenirs	9.0%	10.9%	10.5%	4.7%
Groceries	6.9%	14.7%	5.7%	2.1%
Entertainment	4.7%	6.9%	5.3%	2.2%
Other	2.7%	4.9%	1.7%	1.0%

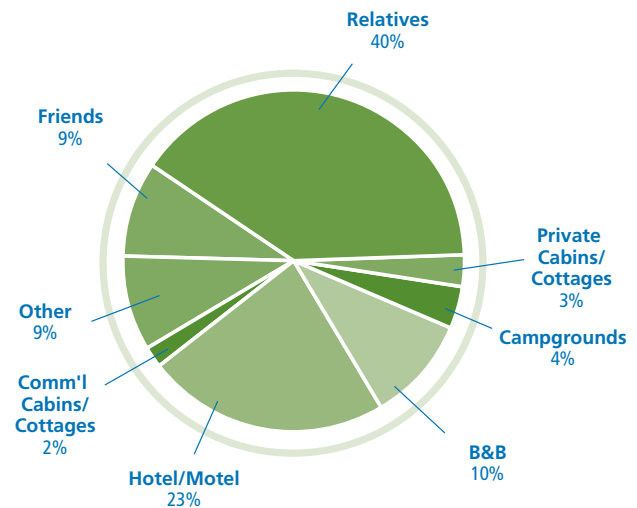
ACCOMMODATIONS NIGHTS

The majority of nights spent by non-resident parties in the Province were spent with relatives (40% of all party nights), with an additional 9% spent with friends. In terms of commercial accommodation, 23% of nights were spent in hotels/motels, 10% in Bed and Breakfasts and 4% were spent in various types of campgrounds (provincial, national or commercial or trailer parks). Commercial cabins and cottages accounted for an additional 2% of the nights. Nine percent of total nights were spent in other forms of accommodations, including university campuses (< 1%), rentals of private residences (2%), ships in port (1%) and own residences (4%).

Depending upon the mode of travel to the Province (air or auto), there were some marked differences in the total percentage of nights spent in various types of accommodation. Most notably, 27% of nights spent by air parties were spent in hotels or motels while only 14% of auto party nights were spent in this type of accommodation. Not surprisingly, a significant percentage, 14% of auto parties nights were spent in Provincial, National or commercial campgrounds or trailer parks compared to less than 1% by air parties.

CHART — I O

2004 NON-RESIDENT PARTIES*
PARTY NIGHTS BY ACCOMMODATION TYPE
 (% NIGHTS - JUNE TO OCTOBER)



* Source: Exir Survey Data Auto and St. John's Air Combined.

TABLE — 8

2004 NON-RESIDENT TRAVEL PARTIES
% OF PARTY NIGHTS BY TYPES OF ACCOMMODATION
BY MODE
 (JUNE TO OCTOBER)

	Total	St. John's Air Total	Auto Total
Hotel/Motel	23.1%	27.0%	14.2%
Commercial Cabins/Cottages	1.8%	1.2%	3.1%
Bed and Breakfasts/Country Inns	10.4%	11.5%	7.7%
Houses of Relatives	39.5%	39.3%	40.0%
Houses of Friends	8.7%	9.6%	6.6%
Commercial Outfitting Camps	0.7%	0.1%	2.1%
Campgrounds – All Types	4.3%	0.3%	13.5%
Private Cabins/Cottages	3.1%	2.4%	4.7%
All Other Types of Accommodation	8.5%	8.6%	8.1%

MAJOR DESTINATIONS

Western areas of the Province and St. John's remain the major destinations for most non-resident visitors.

The areas of the Province visited by non-residents are greatly influenced by how visitors travel here (air versus auto). This can be seen in **Table 9** that shows the differences in percentages of non-resident parties having visited the various Economic Zones of the Province.

TABLE — 9

2004 NON-RESIDENT TRAVEL PARTIES AREAS OF PROVINCE VISITED BY MODE (% PARTIES-JUNE TO OCTOBER)

	Grand Total	Auto Total	St. John's Air Total
Unweighted Sample	5,502	4,020	1,482
Weighted Total	125,455	33,577	91,878
Zone 1: Rigolet to Nain	0%	0%	0%
Zone 2: Labrador West/Churchill Falls	0%	1%	0%
Zone 3: Happy Valley/Goose Bay/Northwest River	0%	1%	0%
Zone 4: Mary's Harbour to Cartwright	0%	1%	0%
Zone 5: Labrador Straits (L'Anse Au Clair to Red Bay)	1%	4%	0%
Zone 6: Viking Trail, St. Anthony South West to Plum Point, East to Roddickton/Englee	8%	20%	4%
Zone 7: Gros Morne Area, Viking Trail North to and including Plum Point	16%	41%	8%
Zone 8: Deer Lake/Humber Area	7%	17%	3%
Corner Brook/Massey Drive	9%	22%	4%
Zone 9: Stephenville/Port-au-Port/Burgeo	5%	16%	1%
Zone 10: Port-aux-Basques/Doyles/Rose Blanche	9%	32%	0%
Zone 11: Baie Verte/La Scie/Green Bay	2%	8%	1%
Zone 12: Grand Falls-Windsor Area	9%	18%	5%
Zone 13: Bay D'Espoir Area	1%	2%	0%
Zone 14: Gander/Twillingate East to Terra Nova Area	18%	30%	14%
Zone 15: Clarenville/Bonavista Peninsula Area	17%	18%	16%
Zone 16: Burin Peninsula	5%	5%	6%
Zone 17: North West Avalon	5%	8%	4%
Zone 18: Argentia/Placentia Area	5%	8%	4%
Zone 19: North East Avalon (Excluding St. John's and Mount Pearl)	7%	7%	7%
St. John's CMA (Including Mount Pearl)	72%	36%	85%
Zone 20: Southern Shore Area	5%	4%	5%
<i>Total may exceed 100% due to multiple responses</i>			

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 airport. It should also be noted that " % of parties visiting " is not additive across Economic Zone – 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.

A greater percentage of non-resident parties arriving by auto visited western regions of the Province and just over one-third of auto parties (36%) visited the St. John's and surrounding areas. Given the coverage of the exit survey, almost all non-resident parties arriving by air (85%) spent at least one overnight in St. John's and surrounding areas. The percentage of non-resident parties that visited each Zone is presented in **Table 9**.

ACTIVITIES

Touring and exploring activities still top the list of nature and outdoor activities.

As with the regions of the Province visited, many activities undertaken were related to a visitor's method of travel. However, regardless of how people got here, general touring and

exploring activities had the highest levels of participation – 80% of all parties did some pleasure walking or hiking and general sightseeing.

Those activities where a 15-point or greater difference between the percentage of air and auto parties participating are highlighted in **Table 10**. A greater percentage of auto parties visited parks, observed nature, hiked in wilderness areas.

TABLE — 10
2004 NON-RESIDENT TRAVEL PARTIES
PARTICIPATION IN NATURE AND OUTDOOR ACTIVITIES
BY MODE
 (% PARTIES-JUNE TO OCTOBER)

	Grand Total	Auto Total	St. John's Air Total
Unweighted Sample	5,502	4,020	1,482
Weighted Total	125,455	33,577	91,878
Pleasure walking or hiking	80%	78%	81%
General sightseeing (other than guided/ organized tours)	80%	72%	83%
Visit a national, provincial or other nature park	43%	66%	34%
Going to an ocean beach/site for beach combing, swimming	37%	42%	35%
Nature observation -wildlife viewing	35%	53%	28%
Nature observation – plant observation	30%	40%	26%
Whale watching (other than boat tour)	27%	33%	24%
Whale watching boat tour	26%	20%	28%
Hiking in wilderness areas	25%	38%	19%
Seabird watching (other than boat tour)	24%	26%	23%
Sightseeing boat tour	23%	24%	22%
Seabird watching boat tour	23%	15%	26%
Iceberg viewing (other than boat tour)	22%	27%	20%
Birding/bird watching	16%	20%	15%
Nature observation-fossil hunting	15%	11%	17%
Iceberg viewing boat tour	12%	10%	13%
Golfing	9%	9%	8%
Fishing (other than guided trip or chartered boat tour)	8%	16%	5%
Mountain/rock climbing	6%	11%	4%
ATV Touring (All Terrain Vehicle)	5%	9%	3%
Sea kayaking/rafting	3%	4%	3%
Other biking/cycling	3%	6%	2%
Freshwater canoeing/kayaking	2%	4%	1%
Hunting - Big game (black bear, moose, caribou)	2%	4%	1%
Fishing - guided trip or chartered boat tour	2%	4%	1%
Mountain biking	2%	2%	1%
Hunting - Small game and birds	0%	1%	0%
Scuba diving	0%	1%	0%

Total may exceed 100% due to multiple responses

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 airport. Also note, that as with the Zones visited, the " % of parties participating" is not additive across activities.

Shopping and visiting historic sites remain popular activities.

Shopping and visiting historic sites were key activities as reported by 75% and 70% of all non-resident parties, with similar percentages of air and auto parties participating in these activities. Visiting craft shops was also popular as 65%

of all parties reported doing so; however, a significantly higher percentage of auto parties (77% vs 61% of air parties) visited such shops. Visiting lighthouses, nightclubs and museums are also activities participated in by a significant percentage of non-resident visitors, ranging from 52% to 43% of all parties. The degree of participation in specific non-nature-oriented activities is related to the tourism product available in the areas actually visited. Specific percentages of parties participating in all activities are presented in **Table 11**.

TABLE — 11
2004 NON-RESIDENT TRAVEL PARTIES
PARTICIPATION IN OTHER ACTIVITIES DURING VISIT
BY MODE
 (% PARTIES JUNE TO OCTOBER)

	Grand Total	Auto Total	St. John's Air Total
Unweighted Sample	5,502	4,020	1,482
Weighted Total	125,455	33,577	91,878
Shopping (not including craft shops)	75%	79%	73%
National, provincial or other historic sites	70%	74%	69%
Craft shops	65%	77%	61%
Lighthouses	52%	56%	50%
Nightclubs/lounges/pubs	48%	34%	53%
Museums	43%	51%	40%
Interpretation Centres	35%	44%	32%
Live performing music presentations/concerts	34%	27%	36%
Archaeological sites	29%	34%	26%
Special events/festivals	20%	22%	20%
Guided tours (not including boat tours)	20%	22%	19%
Art galleries	16%	15%	17%
Live performing theatre presentations/plays, dinner theatres	14%	14%	14%
Attend sports events	5%	5%	5%
Genealogical searches/investigations	4%	5%	4%
Rent boats/water sport equipment	3%	5%	2%
Take lessons for specific activities or sports	1%	2%	1%
<i>Total may exceed 100% due to multiple responses</i>			

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 airport. Again, percentages are not additive across activities.

DEMOGRAPHICS

Non-resident visitors continue to be older, well-educated and affluent.

Sixty percent of non-resident visitors to the Province during June to October were 45 years of age or older. This percentage includes 12% who were 65 years or older, showing that non-resident visitors are skewing older, not an uncommon trend in the travel industry.

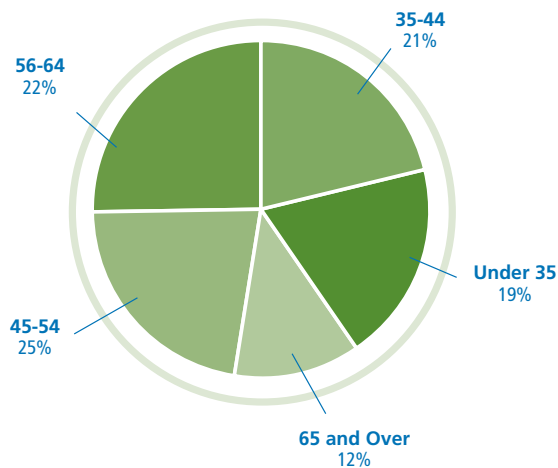
Fifty-five percent of non-resident visitors graduated university, including 23% who have multiple or graduate level degrees, indicating that our visitors are quite well-educated.

Sixty-two percent of these visitors had household incomes greater than \$70,000, with over one-third (36%), reporting incomes of \$100,000 or more.

CHART — I I A

2004 NON-RESIDENT VISITORS AGE*

(JUNE TO OCTOBER)

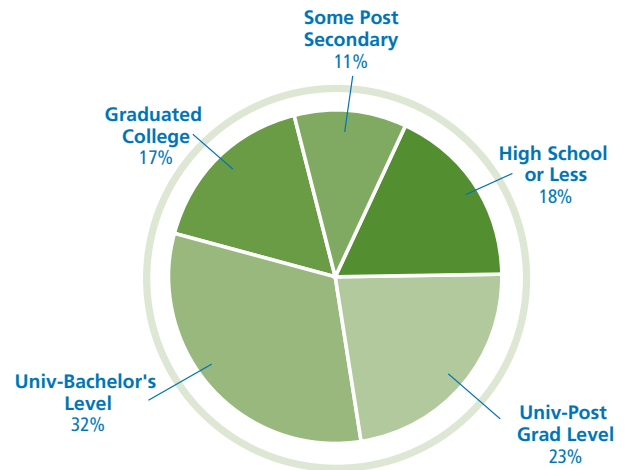


* Source: Exir Survey Data Auto and St. John's Air Combined.

CHART — I I B

2004 NON-RESIDENT VISITORS EDUCATION*

(JUNE TO OCTOBER)

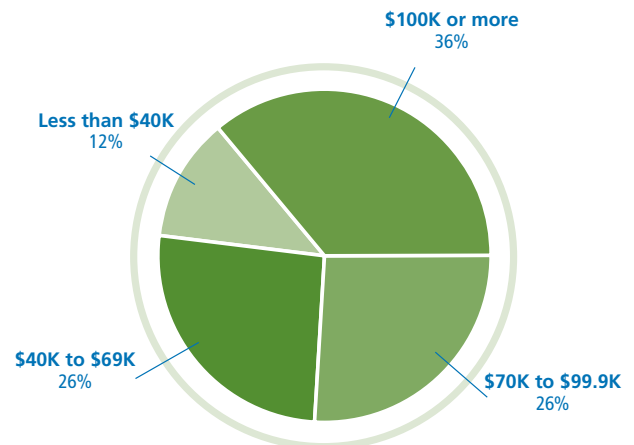


* Source: Exir Survey Data Auto and St. John's Air Combined.

CHART — I I C

2004 NON-RESIDENT VISITORS HOUSEHOLD INCOME*

(JUNE TO OCTOBER)



* Source: Exir Survey Data Auto and St. John's Air Combined.

2003–2004

EXIT SURVEY Program Highlights

GOVERNMENT OF NEWFOUNDLAND AND LABRADOR — DEPARTMENT OF TOURISM, CULTURE AND RECREATION

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For Further Information

This document provides highlights of results from the exit survey. It is by no means meant to be an exhaustive summary of all data collected, but rather serves as a quick snapshot of non-resident visitors to the Province.

Additional information and results from the exit and follow-up surveys may be obtained by visiting the following website www.stats.gov.nl.ca/statistics/ or by contacting:

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Strategic Planning and Policy Division
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