Executive Summary

The importance of resident travellers to the sustainability of tourism product and service offerings in Newfoundland and Labrador is well known. To update its knowledge on resident travellers and their travel habits, the Department of Tourism, Culture and Recreation conducted a travel survey among residents of the province in the fall of 2010. The main objectives of the survey include a better understanding of residents’ travel motivations, attitudes and interests, profiles of the resident traveller and non-traveller and identification of opportunities to influence and increase in-province travel.

Telephone interviews were conducted with 1,800 residents aged 18 or older. The sample was grouped into three strata – St. John’s area, urban and rural residents, with urban communities defined as those having a population of adults aged 18 or older of 4,000 or more. To facilitate the analysis of results, additional residents of Labrador were interviewed, for a total sample of Labrador residents of 313. Residents were asked about vacation travel during the past two years as well as their intentions to take in-province trips over the next 12 months.

The survey found that residents of the province are travellers:
- Seventy-seven percent of residents indicated that they took at least one vacation trip over the past two years.
- On average, residents took 5.0 trips over this 2-year period (including trips to out-of-province destinations).
- Sixty-four percent of residents indicated that they took at least one vacation trip in their home province over the past two years.
- On average, residents took more in-province trips (3.9) than trips outside the province (2.5).

The survey also found that vacation travel is deemed important by the majority of residents, with 75% of them indicating that it is at least somewhat important to them. Importance of vacation travel varies by place of residence (urban versus rural) and by destination (in-province versus out-of-province travel).

Residents don’t appear to travel on impulse, with almost three in five travellers indicating that they research and plan their vacation trips. On average, residents start researching their trips 8.0 weeks in advance using a variety of tools. Most frequently, residents use recommendations from friends and family to plan their trips or go online to check websites (other than newfoundlandlabrador.com) and online reviews. During travel, the most popular sources of information are printed maps and event or attraction specific printed brochures. Generally, residents who travel (in or out-of-province), prefer to make all their travel arrangements before they leave and are looking for deals and package offers.

While there is only a small group of residents that either has no interest in travel at all or doesn’t travel within the province ever, there are also some barriers to in-province travel that could be difficult to overcome. Most often, residents who did not travel in the past two years and/or are not planning to travel in-province over the next 12 months feel that they do not have enough time off, cannot afford travel, have other priorities or don’t travel due to various personal reasons.

When asked to rate Newfoundland and Labrador as a travel destination, residents perceived the province most favourably as a destination offering outdoor and nature-based activities and for sightseeing / scenic touring. They also feel that the province offers a unique vacation experience and
good value for money. Perceptions of the province as a destination for vacation outside of the summer months may provide a challenge to encouraging travel during other seasons. Overall, perceptions of the province as a travel destination vary depending on respondents’ place of residence (urban versus rural).

During the survey, respondents were asked about vacation trips and their travel experiences in Newfoundland and Labrador. Respondents provided information on the total number of trips they took in this province over the past two years as well as information about the destinations, month of travel and length of stay for up to six in-province vacation trips. More detailed information, including type of accommodation used, travel party composition and activities, was provided by residents for their most recent trip in the province.

- The most popular region for vacation travel among residents was the Western region, with 52% of travellers taking at least one trip there over the past two years. The Central region (46%) and the St. John’s CMA (38%) round out the top three in-province travel destinations to which residents took at least one vacation trip.
- In terms of travel distance, there is some propensity towards shorter trips and travelling in one’s “own backyard”, with more in-province travellers travelling in their own region the further west they reside.
- The average length of in-province vacation trips was 4.5 nights, with vacation trips in Labrador lasting longest with an average of 7.7 nights.
- Eighty percent of in-province travellers took summer vacations at home. Fall was the second most popular travel season, with 47% of residents indicating that they had done so while just over one in five residents travelled in either spring or winter. Half of all residents are multi-season travellers.
- For almost half of resident travellers (46%), scenic touring was a key activity during their last NL vacation, while 36% went shopping and 27% reported going trail / wilderness hiking. While scenic touring, shopping and visiting family and friends were the top three trip motivators by far (cited by 11% of respondents each), survey results indicate that vacation trips over the past two years were motivated by a wide variety of activities.
- Those who travelled in-province were highly satisfied with their experience and are also very likely to recommend the province as a vacation destination to others.

The survey found that there are some key demographic differences between travellers and non-travellers, with travellers tending to be more educated and having higher average annual household incomes. The majority of non-travellers tends to skew older with almost two in five being age 55 or older. Region of residence also appears to impact on whether residents are more likely to be travellers or non-travellers.

At the time of the survey, more than one in three residents already had firm plans to travel in-province in the next 12 months, with another 36% expressing that they probably would go on a trip at home. July and August were by far the most popular months for potential in-province vacations, with residents indicating little intent to travel outside the summer season. Motivators identified by residents that would stimulate off-season travel were limited and included lower rates/all-inclusive packages, vacationing with family and friends, special events, concerts or festivals and more things to do. It also appears that weather is a significant factor influencing residents’ motivation to take a vacation trip in their home province.
Apart from the weather, snowmobiling was not only identified as the top motivator for in-province winter trips but also came out on top as winter travellers’ (actual and potential) most important winter vacation pursuit, with 48% of respondents indicating that this activity is always or often important when planning an in-province trip. When it comes to activities that residents are generally interested in when they travel in their own province, scenic touring, attending local entertainment and visiting historic sites, museums or archeological sites were identified as the top three vacation pursuits.

In order to encourage and increase in-province travel among residents, those who have travelled here in the past appear to offer the most potential. Keeping in mind the time frame for advance travel planning, facilitating the ease of making travel arrangements, providing travel offers that are perceived as “good deals” as well as addressing the interest in taking multiple shorter trips (rather than one long vacation) among a portion of residents are key to achieving growth in the resident travel market.
Table of Contents

Section 1: Introduction ....................................................................................................................1
   Background..................................................................................................................................1
   Objectives ....................................................................................................................................1
Section 2: Research Methodology ..................................................................................................2
   Population ...................................................................................................................................2
   Sample Size and Selection ...........................................................................................................2
   Questionnaire Design ..................................................................................................................3
   Reporting .....................................................................................................................................4
Section 3: Incidence and Frequency of Vacation Travel ...............................................................7
   Overall Vacation Travel- Incidence..............................................................................................7
   Number of Vacation Trips............................................................................................................9
Section 4: General Attitudes towards Vacations ..........................................................................10
   Perceived Importance of Vacation Travel .................................................................................10
   Vacation Travel Attitudes and Preferences ...............................................................................12
Section 5: Perceptions of Newfoundland and Labrador as a Travel Destination .........................16
Section 6: A Detailed Look at Out-of-Province Vacation Travel .....................................................17
   Incidence- Out-of-Province Vacation Travel ..............................................................................17
   Frequency ..................................................................................................................................18
   Destinations ...............................................................................................................................20
Section 7: A Detailed Look at In-Province Vacation Travel...............................................................21
   Incidence-In-province Vacation Travel......................................................................................21
   Frequency ..................................................................................................................................22
   Top Destinations........................................................................................................................23
   Length of In-province Trips.........................................................................................................26
   Seasonal Travel within Newfoundland and Labrador ...............................................................26
   Last NL Vacation Experience ......................................................................................................28
   Where They Stayed ....................................................................................................................28
   What They Did ..........................................................................................................................29
   Who They Travelled With .........................................................................................................30
   Their Experience .......................................................................................................................31
Section 8: Travellers versus Non-Travellers Profile ................................................................. 33
  Who They Are ......................................................................................................................... 33
  Travel Attitudes and Preferences ............................................................................................ 35
Section 9: Awareness and Marketing ....................................................................................... 37
  Awareness ................................................................................................................................. 37
  Impact ..................................................................................................................................... 38
Section 10: Travel Intentions .................................................................................................... 39
  Propensity for Future In-Province Travel ................................................................................ 39
Section 11: Motivators for NL Vacation Travel ........................................................................ 42
  Seasonal Motivators ............................................................................................................... 42
  Travel Packages and Promotions ............................................................................................ 44
  Product Interests ..................................................................................................................... 45
  Trans Labrador Highway .......................................................................................................... 47
Section 12: Planning In-Province Vacation Travel ................................................................. 48
  Decision to Travel in NL .......................................................................................................... 48
  Trip Planning Tools for NL Vacation Travel .......................................................................... 50
Conclusions .............................................................................................................................. 54
  Findings .................................................................................................................................. 54
Appendix A: Questionnaire ....................................................................................................... 18
Section 1: Introduction

Background

The importance of resident travellers to the on-going sustainability of tourism product and service offerings in Newfoundland and Labrador (NL) is well known. In 2010, 86 percent of all person trips in the province were made by residents, who contributed $468 million dollars to various providers within the sector. Challenges faced by tourism operators typically involve the uneven demand for their services, where many reach capacity and have prosperous peak seasons, but are less successful in the off-season. This, for many, means that they operate on a very short season, which in turn can limit product and service availability in the off-season. As the Department of Tourism, Culture and Recreation (TCR) continues to update its product and marketing strategies, good, current information is important. To this end, updating knowledge on resident travellers and their travel habits will serve to help profile the resident traveller and non-traveller; provide information to support the evaluation and measurement of product and marketing programs as well as identify whether there are new opportunities to grow tourism in this segment.

The 2010 Newfoundland and Labrador Resident Travel Survey (hereafter referred to as the Resident Travel Survey) serves as a key source of this information.

Objectives

The specific objectives of the Resident Travel Survey included:

- to determine the extent and purpose of resident travel (in and out of province);
- to determine residents’ attitudes towards and interest in NL as a vacation destination;
- to develop resident traveller profiles and identify non-travellers and their characteristics;
- to determine the potential market size for in-province travel;
- to determine trip motivating factors and identify the importance of activities as trip influencers;
- to determine opportunities to influence and increase in-province travel by residents; and
- to investigate travel planning behaviour.

The survey was conducted by St. John’s based MarketQuest Omnifacts Research (MQO).
Section 2: Research Methodology

Population
The population for the survey was all adult residents of NL, aged 18 years or older. The sampling unit was the household – with one individual per household interviewed. Random selection within the household was done using the next birthday technique which selects the individual in the household, aged 18 years or older whose birthday comes next as the individual approached to complete the survey.

Sample Size and Selection
Given the desire to determine the incidence of travel and assess the potential of intra-provincial travel, a stratified random sampling approach was undertaken. The sample was drawn proportionally to the population of adults aged 18 years or older within communities of various sizes. A total of 1,800 surveys was completed, with an additional sample of 218 in Labrador, for a total sample of Labrador residents of 313. To account for community size in the sampling design, MQO monitored the completed sample based on community size, setting broad geographic quotas. Urban communities were defined as those communities having a population of adults aged 18 or older of 4,000 or more. The population distribution and the quotas set are presented below.

<table>
<thead>
<tr>
<th>Community</th>
<th>Population 18+</th>
<th>% of Total Population 18+</th>
<th>Sample Quotas</th>
</tr>
</thead>
<tbody>
<tr>
<td>St. John’s area</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Torbay</td>
<td>4,760</td>
<td>1.17%</td>
<td></td>
</tr>
<tr>
<td>Portugal Cove-St. Philip's</td>
<td>5,040</td>
<td>1.24%</td>
<td></td>
</tr>
<tr>
<td>Paradise</td>
<td>9,570</td>
<td>2.36%</td>
<td></td>
</tr>
<tr>
<td>Conception Bay South</td>
<td>16,910</td>
<td>4.17%</td>
<td></td>
</tr>
<tr>
<td>Mount Pearl</td>
<td>19,505</td>
<td>4.81%</td>
<td></td>
</tr>
<tr>
<td>St. John’s</td>
<td>82,350</td>
<td>20.33%</td>
<td></td>
</tr>
<tr>
<td><strong>Subtotal: St. John’s area</strong></td>
<td><strong>138,135</strong></td>
<td><strong>34.10%</strong></td>
<td><strong>614</strong></td>
</tr>
<tr>
<td>Other Urban</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clarenville</td>
<td>4,040</td>
<td>1.00%</td>
<td></td>
</tr>
<tr>
<td>Bay Roberts</td>
<td>4,230</td>
<td>1.04%</td>
<td></td>
</tr>
<tr>
<td>Marystown</td>
<td>4,305</td>
<td>1.06%</td>
<td></td>
</tr>
<tr>
<td>Stephenville</td>
<td>5,200</td>
<td>1.28%</td>
<td></td>
</tr>
<tr>
<td>Labrador City</td>
<td>5,635</td>
<td>1.39%</td>
<td></td>
</tr>
<tr>
<td>Happy Valley-Goose Bay</td>
<td>5,675</td>
<td>1.40%</td>
<td></td>
</tr>
<tr>
<td>Gander</td>
<td>7,815</td>
<td>1.93%</td>
<td></td>
</tr>
<tr>
<td>Grand Falls-Windsor</td>
<td>10,870</td>
<td>2.68%</td>
<td></td>
</tr>
<tr>
<td>Corner Brook</td>
<td>16,390</td>
<td>4.05%</td>
<td></td>
</tr>
<tr>
<td><strong>Subtotal: Other Urban</strong></td>
<td><strong>64,160</strong></td>
<td><strong>15.84%</strong></td>
<td><strong>285</strong></td>
</tr>
<tr>
<td>Rural</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All other communities</td>
<td>202,830</td>
<td>50.07%</td>
<td>901</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>405,125</strong></td>
<td><strong>100.00%</strong></td>
<td><strong>1800</strong></td>
</tr>
</tbody>
</table>

Source: Statistics Canada – 2006 Census
Questionnaire Design

The focus of the Resident Travel Survey was on leisure, vacation and pleasure travel only, including visiting friends and relatives. For the purpose of the survey, vacation/pleasure trips were defined as:

- **Planned overnight** trips taken for vacation or pleasure, including get-away weekends, pleasure trips taken as part of business trips and trips to visit friends and relatives.
- Trips NOT included were **regular** weekend trips to a family cottage or cabin or special camping place, **regular** and **routine** trips for work/business or to visit friends or relatives, trips to **participate** in sports or other competitions, and any other **regular** and **routine** trips.

Throughout this report these trips are referred to as vacation travel.

The questionnaire was designed to gather specific information which included:

- Incidence of intra-provincial tourism by NL residents;
- Potential for motivating travel within the province;
- Motivations for intra-provincial travel;
- Barriers to intra-provincial pleasure/vacation travel;
- Characteristics of intra-provincial vs. outbound trips (time of travel, distance, frequency, destination(s));
- Trip activities, importance of trip activities and the level of product usage (trails, sites, attractions, etc);
- Insights into travel motivators (e.g., nature-based/outdoor vs. cultural activities, product strengths and weaknesses);
- Demographic profiles of various pleasure/vacation tourist segments (e.g., non-travellers vs. travellers);
- Insights on seasonal travel (e.g., demographics of travellers by season, activity participation, attitudes, preferences for winter tourism);
- Level of awareness of travel opportunities in spring and fall;
- Accommodation preferences;
- Insights into travel experiences sought;
- Trip planning behaviour and use of trip planning tools; and
- In-province advertising awareness.

The questionnaire was developed in consultation with TCR and priorities were established to guide the degree to which the information gathered was addressed with survey questions. A copy of the questionnaire is included in Appendix A.
Final Report - 2010 Resident Travel Survey

Reporting
The following report provides a detailed look at the results of the 2010 Resident Travel Survey. Primary segments or subgroups analyzed were:

- All respondents
- Traveller versus Non-traveller
  - Traveller – In-province trips only; Out-of-province trips only; Both in/out-of-province
- Urban versus Rural residents
- St. John’s Census Metropolitan Area (CMA) residents versus residents from the remainder of the Province
  - The St. John’s CMA differs slightly from the St. John’s area (urban) definition used in the sampling plan. The St. John’s CMA, in addition to the urban centres outlined in the sampling plan, also includes the following communities that would be considered “rural” as per the sampling plan: Pouch Cove, Bauline, Flatrock, Logy Bay – Middle Cove – Outer Cove, Petty Harbour – Maddox Cove, Bay Bulls and Witless Bay. For a map displaying the St. John’s CMA, please refer to http://www.stats.gov.nl.ca/Maps/pdfs/StJohnsCMA.pdf.
- Labrador residents
- Economic Zones:
  - St. John’s CMA
  - Avalon (Economic Zones 17 to 20 excluding St. John’s CMA)
  - Eastern (Economic Zones 15 to 16)
  - Central (Economic Zones 11 to 14)
  - Western (Economic Zones 6 to 10)
  - Labrador (Economic Zones 1 to 5)
  For a map displaying the province’s economic zones, please refer to http://www.stats.gov.nl.ca/Maps/PDFs/EZ_NL.pdf

The results were weighted by age and gender. Throughout the tables and report, weighted results are presented along with unweighted sample sizes.

Results in this report have been categorized by major themes. Significant differences identified from the various analyses conducted are presented within the discussion of the thematic area, as relevant.
Throughout the report results are presented for a variety of subgroups. The graphic below illustrates the key subgroups and the associated sample sizes.

**Sample Subgroups of Interest**

- **Total Sample**
  - *n*=1800

- **Vacation Travellers**
  - *n*=1388
  - 77% of total sample

- **Non-Travellers**
  - *n*=412
  - 23% of total sample

- **Travelled within NL**
  - *n*=1146
  - 83% of travellers
  - 64% of total sample

- **Only Travelled Within NL**
  - *n*=336
  - 31% of NL travellers
  - 26% of travellers
  - 20% of total sample

- **Travelled outside NL**
  - *n*=1052
  - 74% of travellers
  - 57% of total sample

- **Travelled Inside and Outside NL**
  - *n*=810
  - 57% of travellers
  - 44% of total sample

- **Only Travelled Outside NL**
  - *n*=242
  - 23% of outside travellers
  - 17% of travellers
  - 13% of total sample
The margin of statistical error associated with the results varies based on the number of respondents to the particular question being reported. To assist the reader, key subgroup sample sizes reported and the related margin of error are presented below.

<table>
<thead>
<tr>
<th>Subgroup of Interest</th>
<th>N</th>
<th>Margin of Error</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total sample</td>
<td>1,800</td>
<td>± 2.3%</td>
</tr>
<tr>
<td>Urban</td>
<td>892</td>
<td>± 3.3%</td>
</tr>
<tr>
<td>Rural</td>
<td>908</td>
<td>± 3.3%</td>
</tr>
<tr>
<td>St. John’s CMA</td>
<td>653</td>
<td>± 3.8%</td>
</tr>
<tr>
<td>Remainder of Province</td>
<td>1147</td>
<td>± 2.9%</td>
</tr>
<tr>
<td>Labrador (entire sample)</td>
<td>313</td>
<td>± 5.5%</td>
</tr>
<tr>
<td>Travellers</td>
<td>1,388</td>
<td>± 2.6%</td>
</tr>
<tr>
<td>Non-travellers</td>
<td>412</td>
<td>± 4.9%</td>
</tr>
<tr>
<td>Travelled within NL</td>
<td>1,146</td>
<td>± 2.9%</td>
</tr>
<tr>
<td>Travelled outside NL</td>
<td>1,052</td>
<td>± 3.0%</td>
</tr>
<tr>
<td>Travelled in-province only</td>
<td>336</td>
<td>± 5.3%</td>
</tr>
<tr>
<td>Travelled out-of-province only</td>
<td>242</td>
<td>± 6.1%</td>
</tr>
<tr>
<td>Travelled both in- and out-of-province</td>
<td>810</td>
<td>± 3.4%</td>
</tr>
<tr>
<td>Travel is important</td>
<td>1,346</td>
<td>± 2.7%</td>
</tr>
<tr>
<td>Travel is important AND travelled in past 2 years</td>
<td>1,179</td>
<td>± 2.8%</td>
</tr>
<tr>
<td>Likely to travel within NL</td>
<td>1,248</td>
<td>± 2.8%</td>
</tr>
<tr>
<td>Unlikely to travel within NL</td>
<td>540</td>
<td>± 4.2%</td>
</tr>
<tr>
<td>Researched travel plans</td>
<td>797</td>
<td>± 3.4%</td>
</tr>
<tr>
<td>Past In-province travellers AND Intend to travel in next 12 months</td>
<td>568</td>
<td>± 4.1%</td>
</tr>
<tr>
<td>Travelled and aware of ads</td>
<td>1,143</td>
<td>± 2.9%</td>
</tr>
</tbody>
</table>

As outlined in the chart above, 313 surveys were collected in total for Labrador including the additional sample. Additional cases were completed for Labrador to provide a larger sample for analysis purposes. While the oversampled cases are not included in the overall provincial sample, any references to the Labrador region in this report include respondents from the oversample.
Section 3: Incidence and Frequency of Vacation Travel

This section of the report presents the incidence and frequency of vacation travel by all Newfoundland and Labrador residents, as well as for various subgroups of interest. It must be remembered that vacation travel was specifically defined for this study. The definition is repeated here for reference:

- **Planned overnight** trips taken within the **past two years** for vacation or pleasure and included get-away weekends, pleasure trips taken as part of business trips and trips to visit friends and relatives.

- Trips NOT included were **regular** weekend trips to a family cottage or cabin or special camping place, **regular** and **routine** trips for work/business or to visit friends or relatives, trips to **participate** in sports or other competitions, and any other **regular** and **routine** trips.

**Overall Vacation Travel- Incidence**

Newfoundlanders and Labradorians are travellers as evidenced by the 77 percent who have taken at least one vacation or pleasure trip (anywhere) within the past two years. While the majority of this group (or 44% of all residents) took both in- and out-of-province trips, 20 percent **only travelled within NL** while 13 percent **only took a vacation trip outside** the province. This translates into an in-province incidence of vacation travel of 64 percent and an incidence of 57 percent of residents taking vacation travel out of the province.

![Incidence of Travel - All Residents -](image-url)
There were variations in the incidence of travel by key variables. Urban residents were more likely to have travelled compared to their rural counterparts. Similarly, the incidence of travel among residents of the St. John’s CMA was significantly higher than the remainder of the province. There was no difference in the incidence of vacation travel between residents of the island portion of Newfoundland versus Labrador.

The table below provides an overview of the incidence of vacation travel for each of the key segments. Further detail on in-province and out-of-province travel is outlined later in this report.

<table>
<thead>
<tr>
<th>Sample/Subgroup of Interest</th>
<th>Overall</th>
<th>Out-of-Province</th>
<th>In-Province</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Residents</td>
<td>77%</td>
<td>57%</td>
<td>64%</td>
</tr>
<tr>
<td>Urban</td>
<td>84%</td>
<td>67%</td>
<td>67%</td>
</tr>
<tr>
<td>Rural</td>
<td>70%</td>
<td>47%</td>
<td>61%</td>
</tr>
<tr>
<td>St. John’s CMA</td>
<td>83%</td>
<td>68%</td>
<td>65%</td>
</tr>
<tr>
<td>Remainder of the Province</td>
<td>74%</td>
<td>51%</td>
<td>64%</td>
</tr>
<tr>
<td>Labrador</td>
<td>81%</td>
<td>54%</td>
<td>70%</td>
</tr>
</tbody>
</table>
Number of Vacation Trips

Of the residents surveyed, 21% had taken one or two vacation trips over the course of the past two years. One-quarter indicated they took three or four trips while 16 percent had taken five or six trips. The average number of vacation trips taken was 5.0. Sixteen percent of the population took 7 or more vacation trips during this period.
Section 4: General Attitudes Towards Vacation Travel

**Perceived Importance of Vacation Travel**

Vacation travel is at least somewhat important to 75 percent of Newfoundlanders and Labradors surveyed.

This percentage increases significantly based on whether the individual actually travelled within the past two years for vacation or pleasure. At 84 percent, vacation travel is important to almost twice as many of those who have actually travelled compared to 44 percent of those who have not travelled for vacation within the past 2 years.
Furthermore, vacation travel is relatively more important to urban residents compared to rural residents, yet it still remains important to the majority of rural residents. Similarly, it is important to 80 percent of those living in the St. John’s CMA compared to 72 percent of those living elsewhere in the province.

Results were also examined based on the destinations visited. This analysis showed that vacation travel is very important to those who leave the province for at least some of their vacation travel and less so for those who only travel within the province. As seen in the graph, 45 percent of those who travel outside NL only and 50% of those who travel both within and outside the province, deem vacation travel to be “very important”, compared to only 18% of those who travel in-province only.
Vacation Travel Attitudes and Preferences

Those who indicated vacation travel was very or somewhat important were asked to indicate their level of agreement with a series of statements related to their attitudes and preferences regarding vacation travel. This represents a subgroup of 1,346 respondents. Nearly all residents from this subgroup indicated that they like pre-arranging travel, find outdoor activities and interaction with nature important and enjoy exploring history and historic sites. Learning about the lifestyle, heritage, arts and culture of their destination is also important when travelling for these respondents. Over three-quarters indicated they usually look for bargains when planning their vacation.

![Diagram of travel attitudes and preferences]

n=1,346

Travel Attitudes and Preferences
- Those indicating travel is "very" or "somewhat" important -
- % who agree -

- I like to make all my travel arrangements before I start my vacation
  - Strongly agree: 61%
  - Somewhat agree: 28%
  - Total: 89%

- Outdoor activities and interaction with nature are important to me when I travel on my vacation
  - Strongly agree: 46%
  - Somewhat agree: 43%
  - Total: 89%

- I enjoy exploring history and visiting historic sites and attractions on my vacation
  - Strongly agree: 44%
  - Somewhat agree: 44%
  - Total: 88%

- Learning about the lifestyle, heritage, arts, culture and the people of a destination is important to me when I travel on my vacation
  - Strongly agree: 41%
  - Somewhat agree: 45%
  - Total: 86%

- I usually look for vacation bargains and special promotions when planning my vacation
  - Strongly agree: 45%
  - Somewhat agree: 33%
  - Total: 78%
Slightly fewer (about seven in ten) residents indicated they prefer package vacations and destinations which provide activities and attractions for families with children. Two-thirds prefer city activities such as sightseeing and shopping while 64% of respondents prefer to take multiple short trips. Finally, over six in ten (62%) visit destinations to attend festivals or special events; over half (57%) prefer to only take their longest vacation during the summer, while just over one-quarter (26%) plan their vacation around business trips.
There were a number of noted differences between those living in St. John’s CMA compared to those living in other areas of the province. While both groups were similar in agreeing somewhat or strongly with a number of statements, there were differences in the percentage of who “strongly” agreed with the statement, denoting a greater extent of preference among some residents as highlighted in the table below.

St. John’s CMA residents are:
- **less** likely to indicate that outdoor activities and interacting with nature on vacations was important;
- **less** likely to look for destinations offering activities and attractions for families and children;
- **more** likely to indicate city activities (sightseeing, shopping, visiting restaurants and bars) are important to vacation travel;
- **less** likely to visit specific places to attend festivals and special events;
- **less** likely than residents from other areas to look for all inclusive package vacations;
- **less** likely to prefer taking a number of short trips instead of one long one; and
- **less** likely to only take their longest vacation during the summer months.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>St. John’s CMA n=527</th>
<th>Remainder of the Province n=819</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outdoor activities &amp; interaction with nature are important</td>
<td>40%</td>
<td>49%</td>
</tr>
<tr>
<td>Enjoy exploring history &amp; visiting historic sites</td>
<td>43%</td>
<td>45%</td>
</tr>
<tr>
<td>Learning the lifestyle, heritage, arts and culture is important</td>
<td>39%</td>
<td>43%</td>
</tr>
<tr>
<td>Important for destination to have activities and attraction for families and children</td>
<td>34%</td>
<td>44%</td>
</tr>
<tr>
<td>Prefer city activities such as sightseeing, shopping, restaurants and bars</td>
<td>30%</td>
<td>24%</td>
</tr>
<tr>
<td>Visit specific places to attend festivals or special events</td>
<td>13%</td>
<td>23%</td>
</tr>
<tr>
<td>Prefer all-inclusive package vacations</td>
<td>29%</td>
<td>43%</td>
</tr>
<tr>
<td>Look for bargains and special promotions</td>
<td>45%</td>
<td>45%</td>
</tr>
<tr>
<td>Make all travel arrangements in advance</td>
<td>63%</td>
<td>60%</td>
</tr>
<tr>
<td>Prefer multiple short trips</td>
<td>19%</td>
<td>33%</td>
</tr>
<tr>
<td>Plan vacation travel around business trips</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>Only take longest vacation during summer</td>
<td>30%</td>
<td>40%</td>
</tr>
</tbody>
</table>

Those residents who feel that travel is important and who **only** took vacation trips over the past two years **outside** of NL also expressed different levels of agreement on some questions related to travel activities and attitudes compared to those who travelled **only within NL** or those who had travelled **both within and outside** the province. The sample for this subgroup is 1,179. Again, these differences are noted based on the percentage of residents who “strongly” agree with the statements presented.
Out of province travellers are:

- less likely to indicate that outdoor activities and interacting with nature on vacations were important;
- less likely to look for destinations offering activities and attractions for families and children;
- more likely to prefer city activities such as sightseeing, shopping and visiting restaurants and bars;
- more likely to look for bargains and special promotions; and
- less likely to take their longest vacation during the summer months.

Table 5: Travel Attitudes and Preferences
- *Travellers* indicating travel is “very” or “somewhat” important -
- % strongly agree -
  (n=1,179)
Section 5: Perceptions of Newfoundland and Labrador as a Travel Destination

Those for whom vacation travel is important (n=1346) were also asked to rate NL as a travel destination on a number of attributes using a 10-point scale, where 10 is excellent, and 1 is poor. An assessment of the top 3 ratings – the percentage of individuals rating NL as 8, 9 or 10, referred to here as the top 3 score - shows that residents’ perceptions of their home province as a travel destination align with those attributes being marketed. Respondents perceive the province strongest as a vacation destination:

- For outdoor and nature-based activities;
- For sightseeing and scenic driving tours;
- Offering local festivals and events;
- Offering a different or unique vacation experience; and
- For activities and attractions to learn about the history and culture.

The province is perceived weakest as a non-summer vacation destination. Generally, rural residents perceived NL more positively on almost all attributes than urban residents. In particular, rural residents think more highly of the province as a destination to get good value for money, having things to do and see for families and children and offering opportunities, activities and attractions to experience fall travel.

### Table 6: Perceptions of NL - Top 3 Scores
- Those indicating travel is “very” or “somewhat” important -

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Total n=1,346</th>
<th>Urban n=732</th>
<th>Rural n=614</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strongest Attributes</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outdoor and nature-based activities</td>
<td>85%</td>
<td>84%</td>
<td>87%</td>
<td>3%</td>
</tr>
<tr>
<td>Sightseeing/scenic driving tours</td>
<td>80%</td>
<td>78%</td>
<td>83%</td>
<td>5%</td>
</tr>
<tr>
<td>Festivals or special events</td>
<td>74%</td>
<td>73%</td>
<td>75%</td>
<td>2%</td>
</tr>
<tr>
<td>Different / unique vacation experience</td>
<td>71%</td>
<td>73%</td>
<td>68%</td>
<td>5%</td>
</tr>
<tr>
<td>Learning about history and culture</td>
<td>70%</td>
<td>68%</td>
<td>73%</td>
<td>5%</td>
</tr>
<tr>
<td><strong>Moderate Attributes</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Value for money</td>
<td>64%</td>
<td>59%</td>
<td>69%</td>
<td>10%</td>
</tr>
<tr>
<td>Culinary experiences</td>
<td>59%</td>
<td>56%</td>
<td>63%</td>
<td>7%</td>
</tr>
<tr>
<td>Activities for families with children</td>
<td>59%</td>
<td>54%</td>
<td>64%</td>
<td>11%</td>
</tr>
<tr>
<td><strong>Weakest Attributes</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fall travel/trips</td>
<td>50%</td>
<td>45%</td>
<td>56%</td>
<td>11%</td>
</tr>
<tr>
<td>Winter travel/trips</td>
<td>48%</td>
<td>46%</td>
<td>49%</td>
<td>3%</td>
</tr>
<tr>
<td>Spring travel/trips</td>
<td>38%</td>
<td>35%</td>
<td>43%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Residents of St. John’s CMA mirror the urban results reported above in terms of their perceptions of NL as a vacation destination.
Section 6: A Detailed Look at Out-of-Province Vacation Travel

The following section presents a more detailed look at out-of-province vacation travel by NL residents within the past two years.

**Incidence - Out-of-Province Vacation Travel**

Fifty-seven percent (n=1052) of Newfoundlanders and Labradors took at least one out-of-province vacation trip within the past two years.

Urban respondents (67%) were significantly more likely to have taken an out-of-province trip compared to rural residents (47%). As with the incidence of travel in general, this trend also extended to residents of St. John’s CMA (68%) versus the remainder of the province (51%). This correlation is to be expected given that the majority of urban residents live in St. John’s CMA. At 54%, more than half of Labrador residents also indicated that they took at least one out-of-province trip, slightly less than provincial residents overall.
The following table summarizes the percentage of residents within various subgroups of interest who took a vacation trip outside NL during the past two years.

### Table 7: Incidence of Out-of-Province Vacation Travel-Past Two Years
By Subgroups of Interest

<table>
<thead>
<tr>
<th>Subgroup</th>
<th>% who travelled Out-of-Province</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Residents</td>
<td>57%</td>
</tr>
<tr>
<td>Urban</td>
<td>67%</td>
</tr>
<tr>
<td>Rural</td>
<td>47%</td>
</tr>
<tr>
<td>St. John’s CMA</td>
<td>68%</td>
</tr>
<tr>
<td>Remainder of the Province</td>
<td>51%</td>
</tr>
<tr>
<td>Labrador</td>
<td>54%</td>
</tr>
</tbody>
</table>

**Frequency**

Thirty-seven percent of residents took one or two trips out-of-province, with 20 percent having taken three or more trips. Among those who took at least one out-of-province vacation trip within the past two years, the **average** number of out-of-province vacation trips taken was **2.5**.
Differences were noted between urban and rural residents – on average urban residents travelled out-of-province more frequently than rural residents taking, on average, almost three out-of-province trips. This trend was also noted among St. John’s CMA residents, who took 2.8 trips on average, compared to residents of the remainder of the province at 2.2 trips.
Destinations

Survey respondents travelling out-of-province were asked to identify primary destinations of up to six trips taken in the past two years. The top mentioned destination was the United States, with 58 percent of this group indicating they made at least one trip across the southern border. This was followed by 18 percent who travelled to Toronto and 16 percent to Halifax while fewer travellers went to Montreal (9%) and Ottawa (7%). Sun destinations were popular as well:

- Cuba (8%)
- Dominican Republic (6%)
- Mexico (4%)
- Jamaica (2%)

The most popular destination in the United States was Florida, accounting for 57 percent of out-of-province trips to the US. Only few out-of-province travellers to the US were destined to other states, with Nevada (Las Vegas) and New York each representing 8 percent of US trips.
Section 7: A Detailed Look at In-Province Vacation Travel

Incidence - In-Province Vacation Travel

Sixty-four percent of residents took at least one vacation or pleasure trip within NL in the past two years. This is a slightly more than the 57 percent who had travelled outside the province.

A portion of these in-province travellers – 20% - have exclusively travelled in the province, while 44% took trips to both in and out-of-province destinations.

Unlike out-of-province travel, there was less of a gap in the incidence of in-province travel among urban residents compared to rural residents (67% versus 61%) and the incidence was equal for residents of St. John’s CMA (65%) compared to the remainder of the province (64%). Labrador residents appear to be the most avid in-province travellers with an incidence rate of 70%.
The table below illustrates the incidence of in-province vacation travel by key subgroups. While the incidence of in-province travel is slightly higher for urban residents than for rural residents, for all subgroups reported below, more than six in ten residents travelled within the province for vacation in the past two years.

<table>
<thead>
<tr>
<th>Subgroup of Interest</th>
<th>% who travelled In-Province</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Residents</td>
<td>64%</td>
</tr>
<tr>
<td>Urban</td>
<td>67%</td>
</tr>
<tr>
<td>Rural</td>
<td>61%</td>
</tr>
<tr>
<td>St. John’s CMA</td>
<td>65%</td>
</tr>
<tr>
<td>Remainder of Province</td>
<td>64%</td>
</tr>
<tr>
<td>Labrador</td>
<td>70%</td>
</tr>
</tbody>
</table>

**Frequency**

As the graph below indicates, over one third (36%) of residents did not take any in-province trips. Three in ten indicated they had taken one or two in-province vacation trips within the past two years while a further one in five had taken three or four trips. Only 14 percent indicated taking five or more such trips. Among those who took at least one in-province vacation trip within the past two years, the average number of trips taken was 3.9. This was significantly higher than the average number of out-of-province trips taken at 2.5. As well, with an average of 4.1, residents from outside St. John’s tended to take more trips within the province compared to St. John’s CMA residents, who took an average of 3.4 trips in the province.
During the survey, travellers were asked to provide details about up to six in-province trips they had taken over the past two years. These details included primary trip destinations, nights spent away from home and month of travel. The next three sections report on this information.

**Primary Destinations (as reported by respondents for up to six in-province trips)**

To further understand in-province travel, primary destinations of up to six in-province trips residents took over the past two years were examined. **This section focuses on the percentage of respondents who visited a region and not the volume of trips to the region.** The following map illustrates the percentage of in-province travellers who visited each region of the province (regional economic zones) at least once.

How to read the map:
For example, the Western region was the top primary destination, being visited by the greatest percentage of in-province travellers: 52% of in-province travellers made at least one trip to this destination.

Among primary in-province destinations, the Western region was the most popular, with 52% of in-province travellers taking at least one trip there. While 46% of in-province travellers chose the Central region for at least one of their trips, 38% of travellers visited St. John’s CMA.

Almost one quarter of in-province travellers visited the Eastern region (24%) at least once, while the Avalon region (13%) and Labrador (7%) welcomed a much smaller number of resident travellers who made at least one trip there.
Primary In-Province Destinations (percentage of in-province travellers taking at least one trip to Regional Economic Zone)

- Labrador - 7%
- Western - 52%
- Central - 46%
- Eastern - 24%
- St. John’s CMA - 38%
- Avalon - 13%
**Where did vacation travellers come from?**

Travel to the various regions (as reported as primary destinations) is dominated to a large extent by travellers from St. John’s CMA:

- St. John’s CMA residents represented the highest proportion of visitors to all regions with the exception of Labrador and the St. John’s CMA itself;
- With the exception of St. John’s CMA itself, shares of travellers residing in St. John’s CMA to other regions are higher the further east the region is located, ranging from representing 57% of travellers to Avalon to comprising 30% of travellers to Labrador.

Travel to the regions:

- Travellers from the Central (30%) and Western regions (31%) represented a higher proportion of travellers to St. John’s CMA than to any other region in the province;
- In Labrador, St. John’s CMA residents represented the second largest group of travellers to this region while Labrador residents represented a higher share of visitors to St. John’s CMA than any other region in the province with the exception of “their own backyard”.
- While residents of St. John’s CMA comprised almost three in five visitors to the Avalon region, this region welcomed equal shares of visitors from the Avalon itself, Eastern, Central and Western regions. Labrador residents comprised only 4% of travellers to the Avalon.

While there are no distinct travel patterns, it does appear that distance plays a role in where residents travelled:

- Residents taking at least one trip in “their own backyard” comprised an increasingly higher proportion of travellers in each region the further west they reside, with less than 1 in 10 St. John’s CMA (7%) and Avalon residents (9%) travelling in the St. John’s CMA and Avalon regions while 1 in 3 Labrador residents travelled in Labrador;
- St. John’s CMA residents comprised more than half of all travellers to the Avalon region (57%) but represented only one in three travellers to Labrador (30%).

Furthermore:

- While St. John’s CMA was most popular with travellers from the Central and Western regions, visitors from Labrador represented a higher percentage of travellers to St. John’s CMA (10%) than those who made a trip to the capital from the Avalon (9%);
- Travellers from the Western region comprised 20% or more of visitors to St. John’s CMA, the Western region itself and the Labrador region.
### Table 9: Origin of Visitors to Primary Destinations

<table>
<thead>
<tr>
<th>Origin</th>
<th>St. John’s CMA</th>
<th>Avalon (Excluding St. John’s CMA)</th>
<th>Eastern</th>
<th>Central</th>
<th>Western</th>
<th>Labrador</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n=452</td>
<td>n=148</td>
<td>n=273</td>
<td>n=508</td>
<td>n=602</td>
<td>n=74</td>
</tr>
<tr>
<td>St. John’s CMA</td>
<td>7%</td>
<td>57%</td>
<td>45%</td>
<td>41%</td>
<td>38%</td>
<td>30%</td>
</tr>
<tr>
<td>Avalon (Excluding St. John’s CMA)</td>
<td>9%</td>
<td>9%</td>
<td>17%</td>
<td>13%</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Eastern</td>
<td>14%</td>
<td>9%</td>
<td>12%</td>
<td>11%</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Central</td>
<td>30%</td>
<td>12%</td>
<td>17%</td>
<td>17%</td>
<td>20%</td>
<td>3%</td>
</tr>
<tr>
<td>Western</td>
<td>31%</td>
<td>10%</td>
<td>8%</td>
<td>14%</td>
<td>21%</td>
<td>20%</td>
</tr>
<tr>
<td>Labrador</td>
<td>10%</td>
<td>4%</td>
<td>2%</td>
<td>5%</td>
<td>3%</td>
<td>33%</td>
</tr>
</tbody>
</table>

**Length of In-province Trips** (as reported by respondents for up to six trips)

The average length of in-province vacation trips for which residents provided details was 4.5 nights. The average trip length varied slightly depending on the primary destination region visited. While the average trip length was longest for trips with the Western region as a primary destination among Island destinations, trips with Labrador as the primary destination were significantly longer at an average of almost 8 nights.

<table>
<thead>
<tr>
<th>Region Visited</th>
<th>N</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>St. John's CMA</td>
<td>417</td>
<td>4.5</td>
</tr>
<tr>
<td>Avalon</td>
<td>145</td>
<td>4.3</td>
</tr>
<tr>
<td>Eastern</td>
<td>264</td>
<td>4.1</td>
</tr>
<tr>
<td>Central</td>
<td>509</td>
<td>4.3</td>
</tr>
<tr>
<td>Western</td>
<td>582</td>
<td>4.6</td>
</tr>
<tr>
<td>Labrador</td>
<td>74</td>
<td>7.7</td>
</tr>
</tbody>
</table>

**Seasonal Travel within Newfoundland and Labrador** (as reported by respondents for up to six trips)

For purposes of this study, the seasons were defined as follows:

- Winter – December, January, February and March
- Spring – April and May
- Summer – June, July and August
- Fall – September, October and November

**Past Travel**

Based on information respondents provided about up to six trips taken in the province over the past two years, it is evident from the graph below that the vast majority of residents (80%) travelled for vacation during the summer. Additionally, more than twice as many in-province travellers took a fall vacation (47%) than took either a Spring (22%) or Winter (22%) vacation in the province.
Potential for Off-Peak Vacation Travel in the Province

Despite the tendency to travel during the peak summer season, there is some appetite among residents to travel in-province during the remainder of the year:

- Fall – 64 percent travelled or would consider travelling;
- Winter – 51 percent travelled or would consider travelling, and
- Spring – 54 percent travelled or would consider travelling.
To further understand off-peak season travel, the percentage of residents who travel in the province across various combinations of seasons was examined (based on information provided for up to six in-province trips). While over one-third of in-province travellers (36%) vacationed in the province during the summer only, many also travelled during other seasons. As highlighted in Table 11, 45% of those taking at least one in-province vacation, took a trip during another season in addition to the summer.

<table>
<thead>
<tr>
<th>Season(s) Travelled</th>
<th>% of those taking at least 1 in-province vacation trip n=1,146</th>
<th>All Respondents n=1,800</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall/Winter/Spring/Summer</td>
<td>3.3</td>
<td>2.1</td>
</tr>
<tr>
<td>Fall only</td>
<td>9.6</td>
<td>6.1</td>
</tr>
<tr>
<td>Winter only</td>
<td>1.8</td>
<td>1.1</td>
</tr>
<tr>
<td>Spring only</td>
<td>1.7</td>
<td>1.1</td>
</tr>
<tr>
<td>Summer only</td>
<td>36.3</td>
<td>23.1</td>
</tr>
<tr>
<td>Fall/Winter</td>
<td>1.2</td>
<td>0.8</td>
</tr>
<tr>
<td>Fall/Winter/Spring</td>
<td>4.9</td>
<td>3.1</td>
</tr>
<tr>
<td>Fall/Spring</td>
<td>6.3</td>
<td>4.0</td>
</tr>
<tr>
<td>Winter/Spring/Summer</td>
<td>2.0</td>
<td>1.2</td>
</tr>
<tr>
<td>Fall and Winter</td>
<td>1.9</td>
<td>1.2</td>
</tr>
<tr>
<td>Fall and Spring</td>
<td>2.2</td>
<td>1.4</td>
</tr>
<tr>
<td>Winter and Spring</td>
<td>0.8</td>
<td>0.5</td>
</tr>
<tr>
<td>Fall and Summer</td>
<td>17.6</td>
<td>11.2</td>
</tr>
<tr>
<td>Winter and Summer</td>
<td>6.0</td>
<td>3.8</td>
</tr>
<tr>
<td>Spring and Summer</td>
<td>4.4</td>
<td>2.8</td>
</tr>
<tr>
<td>No travel within NL</td>
<td>N/A</td>
<td>36.5</td>
</tr>
<tr>
<td>Total</td>
<td><strong>100.0</strong></td>
<td><strong>100.0</strong></td>
</tr>
</tbody>
</table>

**Last NL Vacation Experience**

Respondents who had taken at least one in-province vacation trip within the past two years (n=1146) were asked a series of detailed questions about their last vacation experience. This section reports results based on this subgroup.

**Where They Stayed**

Among travellers who vacationed in the province, almost four in ten (37%) stayed with friends or family. In addition, 7% of in-province travellers reported staying at a private cottage or cabin, making private accommodations one of travellers’ preferred places to stay for at least a portion of their in-province trip. Hotels or motels were the second most common type of accommodation, used by 33 percent of residents during their last in-province vacation trip. In addition, 12 percent of in-province travellers stayed at commercial cottages or cabins.
When the type of accommodation used was examined by other key variables, the following differences were noted:

- Travellers from St. John’s CMA were more likely to stay at a commercial cottage/cabin, campground or bed & breakfast; and
- Residents from the remainder of the province tended to stay more with friends and family or in a hotel/motel.

### Table 12: Accommodations

<table>
<thead>
<tr>
<th>Top Mentions</th>
<th>St. John’s CMA n=415</th>
<th>Remainder of Province n=731</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friend or family’s house</td>
<td>31%</td>
<td>42%</td>
</tr>
<tr>
<td>Hotel/Motel</td>
<td>22%</td>
<td>39%</td>
</tr>
<tr>
<td>Commercial Cottage/Cabin</td>
<td>19%</td>
<td>7%</td>
</tr>
<tr>
<td>Campground</td>
<td>13%</td>
<td>8%</td>
</tr>
<tr>
<td>Bed &amp; Breakfast</td>
<td>11%</td>
<td>4%</td>
</tr>
<tr>
<td>Private Cottage/Cabin</td>
<td>10%</td>
<td>5%</td>
</tr>
</tbody>
</table>

The picture is similar when comparing urban and rural residents, with rural residents being more likely to stay with friends and family (42%) or in a hotel/motel (37%) compared to 34% and 29% respectively of urban residents. On the other hand, considerably more urban residents stayed at commercial cottages or cabins (16%) and Bed & Breakfasts (10%) than rural residents (6% and 4% respectively).

### What They Did

At 46%, scenic touring was by far travellers’ top vacation pursuit during the most recent trip in their “own backyard”. This was the case for both rural and urban respondents. Shopping (36%) and trail/wilderness hiking (27%) round out the top three activities. While travellers from rural areas were much more likely to have gone shopping during their vacation (45%), urban travellers were more
interested in trail/wilderness hiking (32%). Almost one in five urban travellers also engaged in pleasure walking in/around communities but only one in ten rural travellers did so. Culinary experiences were enjoyed by 17 percent of in-province travellers regardless of their origin. Camping, visiting drinking establishments and boating appear to have been vacation activities pursued by niche groups of in-province travellers. Also, more urban residents participated in golfing, canoeing and special occasions (weddings, reunions, Christenings) during their vacation trips while rural residents spent more time hunting or ATV touring.

When asked which, if any, of these activities was a prime motivator for their trip within NL, respondents singled out visiting friends and family, shopping and scenic touring. However, it is important to note that just 11 percent of respondents indicated that these activities influenced their decision to travel. Table 13 shows that most of the mentions of motivating activities are very low, pointing to the diversity of motivating experiences among in-province travellers, with 27 percent indicating that none of the activities was a prime motivator. Overall, the list of motivating activities was diverse, with many activities being mentioned by just one percent or less of in-province travellers. Other activities mentioned included: picking berries, visiting beaches, snowmobiling, ATV touring, biking/dirt biking/motorcycling, zip lining, photography, sport events and geo-caching. Motivating activities were also very similar for both urban and rural residents, with only shopping being twice as likely to be a trip motivating factor for rural residents (15%) than it would be for urban residents (7%).

### Who They Travelled With

Residents who vacationed within the province travelled with a diverse group of people, but the largest proportion travelled as couple or couples with no children, which was the case for 40% of respondents.
About one quarter of in-province travellers travelled with children, mainly as one couple with children (21%), with an additional 4 percent travelling as two or more couples with children. Another 14 percent travelled with other family members, indicating that for many residents in-province travel is also a “family affair”. One in ten travellers went on their most recent in-province trip with a group of friends while almost as many travellers went alone. Interestingly, rural travellers (39%) were much more likely to travel as a couple without children compared to those from urban areas (29%) while urban residents were more likely to travel with other family members (16%) compared to rural travellers (12%).

**Travel Party**

- Those who took an in-province trip -

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Alone</td>
<td>9%</td>
</tr>
<tr>
<td>Couple, no children</td>
<td>33%</td>
</tr>
<tr>
<td>Couple with children</td>
<td>21%</td>
</tr>
<tr>
<td>2 or more couples, no children</td>
<td>7%</td>
</tr>
<tr>
<td>2 or more couples, with children</td>
<td>4%</td>
</tr>
<tr>
<td>Other family members</td>
<td>14%</td>
</tr>
<tr>
<td>Group of friends</td>
<td>10%</td>
</tr>
<tr>
<td>Business associates</td>
<td>1%</td>
</tr>
</tbody>
</table>

**Their Experience**

It was clear that residents who travelled in-province within the past two years did not go home unhappy. Almost nine in ten rated their level of satisfaction at 8 or higher on a 10-point scale, with almost half (47%) rating their experience a solid “10”, indicating complete satisfaction with their most recent trip. Furthermore, 93% of in-province travellers were very likely to recommend vacationing in NL to others, with almost seven in ten indicating that they are extremely likely (rating of “10”) to recommend the province to others. This suggests that the travel experience offered in the province is exceptional in the eyes of residents who have vacationed here.
Looking at the results of the various traveller segments, at 92%, rural travellers were significantly more satisfied with their last NL vacation than urban residents. Despite the difference, urban travellers were still extremely positive about their vacation experience, with 87% giving a satisfaction rating of 8 or higher. At 93% and 94% respectively, both urban and rural residents are equally likely to recommend the province to others as a vacation destination.

Among the very small group of in-province travellers who were dissatisfied with their experience, reasons for their dissatisfaction included nothing to do in Newfoundland and Labrador and poor accommodations and road conditions. Among those who were unlikely to recommend the province to others for a vacation, respondents cited their trip being expensive, nothing to do and being a resident of the province. It is important to note that these concerns reflect the opinions of a very small subset of travellers evaluating their most recent in-province trip experience.
Section 8: Travellers versus Non- Travellers Profiles

Who They Are

In order to better understand residents of the province who have and who haven’t travelled within the past two years, comparisons were made based on key demographies.

Education

- Travellers tend to be more educated with 56% indicating university or higher level of education while almost half of non-travellers indicated an education level of high school or less;
- Travellers tend to have higher annual household incomes, with one quarter reporting incomes of $100,000 or more while 53 percent of non-travellers indicated incomes of less than $40,000. This compares to just 19 percent of travellers reporting incomes of $40,000 or less; and

This analysis highlighted several key differences between travellers and non-travellers:

- Travellers tend to be more educated with 56% indicating university or higher level of education while almost half of non-travellers indicated an education level of high school or less;
- Travellers tend to have higher annual household incomes, with one quarter reporting incomes of $100,000 or more while 53 percent of non-travellers indicated incomes of less than $40,000. This compares to just 19 percent of travellers reporting incomes of $40,000 or less; and
While there is no significant difference by gender when it comes to travel, travellers tend to reflect the general provincial population (age 18 or older) in terms of age, with the highest proportion of travellers aged 35-54 at 41 percent. About one third of travellers are aged 55 or older. Generally, residents aged 55 or older are more likely to be non-travellers.

From a regional perspective, the graph below illustrates that two in five travellers live in St. John’s CMA while Labrador residents represent 6% of travellers - the only two regions in the province with more resident travellers than non-travellers. While 28% of non-travellers also reside in St. John’s CMA, the share of non-travellers in this region is much smaller than these residents’ share in the overall population (37%), indicating that residents of St. John’s CMA are more likely to be travellers than non-travellers. Whereas residents of the Western and Avalon regions appear to be as likely to be travellers as they are non-travellers, residents of the Eastern and Central regions are more likely to be non-travellers than travellers. As well, travellers tend to be from urban areas (55% of travellers) while non-travellers are more likely rural residents (63% of non-travellers reside in rural areas).

With respect to future travel, at 80 percent, residents who have travelled over the past two years are about twice as likely compared to non-travellers to probably take another in-province trip in the next twelve months, with 43 percent of them already indicating firm travel plans. It is encouraging for in-province travel that also 41 percent of non-travellers indicated they probably or definitely will take an in-province vacation trip within the next twelve months.
Travel Attitudes and Preferences

Vacation travel carries a varying level of importance for different people and for some, vacation travel simply isn’t important. This was clearly evident when the importance of vacation travel was examined comparing travellers to non-travellers. Eighty-four percent of travellers indicated that vacation travel was “somewhat” or “very” important to them compared to just 44 percent of non-travellers.

The lower level of importance placed on vacation travel may be influenced by barriers experienced by non-travellers. If people are unable to travel due to constraints such as money or personal reasons, then vacation travel is likely to be less important to them personally.

When the attitudes and travel preferences of travellers and non-travellers were examined, there were a number of significant differences. Non-travellers were more likely to:
Find it important for a destination to have activities and attractions for families and children;
- Have a preference for package vacations;
- Look for bargains and special promotions;
- Have a preference for multiple short trips;
- Plan vacation travel around business trips; and
- Only take their longest vacation during the summer.

Table 14: Travel Attitudes and Preferences
- % indicating somewhat or strongly agree -

<table>
<thead>
<tr>
<th>Activity Preferences</th>
<th>Travellers (n=1,179)</th>
<th>Non-Travellers (n=167)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outdoor activities &amp; interaction with nature are important</td>
<td>88%</td>
<td>92%</td>
</tr>
<tr>
<td>Learning the lifestyle, heritage, arts and culture is important</td>
<td>87%</td>
<td>85%</td>
</tr>
<tr>
<td>Important for destination to have activities and attraction for families with children are important</td>
<td>70%</td>
<td>80%</td>
</tr>
<tr>
<td>Prefer city activities such as sightseeing, shopping, restaurants and bars</td>
<td>66%</td>
<td>80%</td>
</tr>
<tr>
<td>Enjoy exploring history &amp; visiting historic sites</td>
<td>87%</td>
<td>91%</td>
</tr>
<tr>
<td>Visit specific places to attend festivals or special events</td>
<td>61%</td>
<td>63%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Attitudes Towards Travel</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Prefer all-inclusive package vacations</td>
<td>70%</td>
<td>80%</td>
</tr>
<tr>
<td>Look for bargains and special promotions</td>
<td>78%</td>
<td>82%</td>
</tr>
<tr>
<td>Make all travel arrangements in advance</td>
<td>89%</td>
<td>89%</td>
</tr>
<tr>
<td>Prefer multiple short trips</td>
<td>62%</td>
<td>76%</td>
</tr>
<tr>
<td>Plan vacation travel around business trips</td>
<td>24%</td>
<td>34%</td>
</tr>
<tr>
<td>Only take longest vacation during summer</td>
<td>54%</td>
<td>70%</td>
</tr>
</tbody>
</table>

These preferences and attitudes provide a basis to some extent for opportunities to encourage in-province travel among those who haven’t travelled over the past two years but to whom vacation travel is still important (e.g. create a special offer for a short family get-away).

While there is a subset of residents who haven’t travelled in the past two years but who are likely to travel in-province in the next 12 months (41%), there is also a small group of travellers (n=82) who indicated that they would never take vacation trips in this province. Over a third of these respondents (35%) maintained that they leave the province for vacation travel while 16% cited financial reasons for not travelling in the province. Other reasons included:

- Too expensive to travel within NL – 13%
- Have visited everywhere I want to already – 10%
- Too busy/no time – 10%
- No interest in travel – 9%
- No reason to travel now – 8%
- Personal reasons (e.g. illness) – 7%
- Poor weather – 7%
Section 9: Awareness and Marketing

Awareness

Respondents were asked whether or not they could recall any tourism advertising or promotions related to vacationing in NL in 2010. Awareness was quite high with 82 percent of travellers indicating that they had seen, read or heard some form of advertisement or promotion. This translates into 63 percent of all those surveyed.

<table>
<thead>
<tr>
<th>Aware</th>
<th>Not aware</th>
<th>Don't Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>82%</td>
<td>16%</td>
<td>2%</td>
</tr>
</tbody>
</table>

There were no significant differences in recall levels by urban residents compared to rural residents as well as by residents of St. John’s CMA compared to the remainder of the province. However, among Labrador residents who travelled for vacation in the past two years (n=257), over two thirds (68%) were aware of tourism advertising or promotions, but the recall level was significantly lower compared to all vacation travellers.

While respondents were not asked what advertising or promotion they specifically remembered, 80 percent did recall a specific message of those ads or promotions: 19 percent mentioned “visiting at home” while 17 percent said “come visit” and 16 percent mentioned “beauty/scenery”. There is likely spill from non-resident campaigns based on these mentions. Two percent of respondents mentioned tourism booklets promoting seasonal travel.
Impact

In terms of the impact of the marketing materials, overall the advertising was well received by residents of the province. Among travellers who were aware of advertising (n=1143), the majority indicated that it would make them want to vacation in NL. The impact did not differ based on whether the individual travelled within the province only, outside the province only or both. As with awareness, there was a difference between Labrador residents compared to residents from the rest of the province. Among travellers from Labrador who were aware of the advertising (n=178), a higher proportion (45%) felt that the advertising would not have any influence on their decision to take future vacations in the province.
Section 10: Travel Intentions

**Propensity for Future In-Province Travel**

Seventy-one percent of respondents indicated they will probably or definitely travel in the province for vacation within the next 12 months. Just over one-third indicated they **definitely** plan to travel. This is a positive sign for the future of intra-provincial travel.

![Likelihood of In-Province Travel](image)

At 80 percent, residents who had travelled in the past two years (n=1388) were significantly more likely to indicate that they would travel in the province over the coming year than those residents who didn’t (41%). There was no difference in the overall propensity for intra-provincial travel between rural and urban respondents.

![Likelihood of Intra-Provincial Travel](image)
In terms of when individuals planned to take future in-province vacation trips, the peak months were June through September, with July and August dominating respondents’ travel plans. There was only little intent to travel outside of the summer season.

### Table 15: Time of Year
Future In-province Trips – ALL INTENDERS

<table>
<thead>
<tr>
<th>Month</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>4%</td>
<td>8%</td>
<td>7%</td>
<td>5%</td>
<td>8%</td>
<td>19%</td>
<td>49%</td>
<td>43%</td>
<td>12%</td>
<td>6%</td>
<td>2%</td>
<td>9%</td>
</tr>
</tbody>
</table>

The anticipated timing of in-province trips did not vary based on whether individuals had travelled in the past two years (traveller) or had not (non-travellers). As seen below, the vast majority of non-travellers indicated they would likely take their trip during the summer season between June and September (with July and August being the two most popular months) which is consistent with the intentions of travellers.

### Table 16: Time of Year
Future In-province Trips BY Past Travel Behaviour

<table>
<thead>
<tr>
<th>Month</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travellers</td>
<td>4%</td>
<td>9%</td>
<td>8%</td>
<td>6%</td>
<td>8%</td>
<td>18%</td>
<td>49%</td>
<td>44%</td>
<td>12%</td>
<td>6%</td>
<td>2%</td>
<td>8%</td>
</tr>
<tr>
<td>Non-Travellers</td>
<td>1%</td>
<td>6%</td>
<td>4%</td>
<td>2%</td>
<td>6%</td>
<td>23%</td>
<td>49%</td>
<td>36%</td>
<td>14%</td>
<td>5%</td>
<td>0%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Among those residents who are unlikely to take a vacation or pleasure trip in NL within the next 12 months (n=540), top barriers included a variety of factors such as:

- Too busy/no time (27%);
- Travel outside NL for these types of vacations (19%);
- Can’t afford to travel (14%);
- No interest in travel (13%); and
- Personal reasons – illness/family-related (13%).

It is interesting to note that the majority (55%) of those not planning a NL vacation indicated that travel is at least somewhat important to them.

Results were also analyzed based on whether those not intending to take a vacation trip in the next 12 months had taken a vacation trip in the past 2 years or not. Among recent travellers, the main reasons by far for not planning to take a NL vacation were that they were too busy (29%) and that they travel outside NL for pleasure trips (28%). Personal reasons (9%), no reason to travel now (8%) and no interest/other priorities (7%) round out the top five reasons.

While top reasons of recent non-travellers for not planning to travel in-province over the next 12 months are similar to those of recent travellers, some reasons are felt to a stronger degree (e.g. other
priorities, personal reasons). As well, affordability of travel plays a much greater role for non-travellers, which almost a quarter (24%) of them cited as a reason for not planning a NL vacation. It ties as the top reason with being too busy/no time.

**Top Reasons for Not Planning to Vacation in Newfoundland and Labrador**

<table>
<thead>
<tr>
<th>Travelled in the past 2 years (n=282)</th>
<th>Did not travel in the past 2 years (n=258)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Too busy/no time</td>
<td>Too busy/no time</td>
</tr>
<tr>
<td>Travel outside of NL for pleasure trips</td>
<td>Can’t afford to travel/financial reasons</td>
</tr>
<tr>
<td>Personal reasons (e.g. illness)</td>
<td>No interest/other priorities</td>
</tr>
<tr>
<td>No reason to travel now</td>
<td>Personal reasons (e.g. illness)</td>
</tr>
<tr>
<td>No interest/other priorities</td>
<td>No reason to travel now</td>
</tr>
<tr>
<td>Have vacation plans for elsewhere already</td>
<td>Travel outside NL for pleasure trips</td>
</tr>
<tr>
<td>Can’t afford to travel/financial reasons</td>
<td>Have visited everywhere I want already</td>
</tr>
<tr>
<td>Have visited everywhere I want already</td>
<td>Travel outside NL for pleasure trips</td>
</tr>
<tr>
<td>Too expensive to travel within NL</td>
<td>Have vacation plans for elsewhere already</td>
</tr>
<tr>
<td>Poor weather</td>
<td>Too expensive to travel within NL</td>
</tr>
<tr>
<td>Don’t drive/no transportation</td>
<td>Poor weather</td>
</tr>
<tr>
<td>Don’t Know</td>
<td>Don’t drive/no transportation</td>
</tr>
<tr>
<td></td>
<td>Don’t Know</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

While an overwhelming majority of recent travellers who are not planning a NL vacation in the next 12 months indicated that vacation travel is at least somewhat important to them (80%), only just over one quarter (27%) of recent non-travellers not planning a NL vacation indicated the same. This could imply a more permanent or long-term “status-quo” that non-travellers are facing, resulting in a more challenging task to encourage in-province travel in this segment. However, if vacation travel is regarded as important as it is among recent travellers, some of the reasons cited by this group for not planning an immediate trip may be of a more temporary nature while the long-term travel potential is maintained.

Both groups of non-intenders could only provide limited input when asked what would motivate them to plan a vacation within NL over the next year. While respondents in each segment were equally unable to name any potential motivators (just under 40% each), top motivators included:

- More money/winning lottery or trip (11%);
- Cheaper rates (e.g. airlines, hotels, all inclusive packages) (8%);
- Time / activities with family/friends (8%);
- Concerts, festivals, special events or other attractions (4%);
- More time off (3%)

While recent travellers would be mostly motivated by cheaper rates (11%) and family/friends (11%), more money (15%) was the foremost motivator for recent non-travellers.
Section 11: Motivators for NL Vacation Travel

Seasonal Motivators

Given that in-province travel is usually concentrated during the summer months, residents were asked what would motivate them to take a vacation or pleasure trip during the fall, winter or spring. The tables below identify key motivators for each season. Consistent across each season, close to one-half of those surveyed were unable to provide a response.

Motivators identified for fall vacations were rather limited, with only 60% of respondents providing an answer at all. Furthermore, of those who did respond, 10% didn’t know and 28% responded that nothing would motivate them. Of the motivators that respondents did provide, lower costs or rates for airlines, hotels and all-inclusive packages as well as hunting and fishing stood out with 11% and 10% respectively. Other motivators covered a wide spectrum, indicating that residents would be motivated by a variety of things, including time / activities with family and friends, more time off, more things to do, concerts, festivals or special events and scenery / fall colours. It is important to note that fewer than 10% of respondents mentioned any of these motivators, indicating that each would have a limited impact on the population.

Table 17: Fall Motivators
- Those who considered or took a Fall vacation -

<table>
<thead>
<tr>
<th>Fall</th>
<th>n=876</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost / Rates / Cheaper / All-inclusive</td>
<td>11%</td>
</tr>
<tr>
<td>Hunting/Fishing</td>
<td>10%</td>
</tr>
<tr>
<td>Family / Friends</td>
<td>7%</td>
</tr>
<tr>
<td>Weather</td>
<td>6%</td>
</tr>
<tr>
<td>More time off</td>
<td>5%</td>
</tr>
<tr>
<td>More things to do</td>
<td>5%</td>
</tr>
<tr>
<td>Concerts, festivals or special events</td>
<td>5%</td>
</tr>
<tr>
<td>Scenery / Fall colours</td>
<td>5%</td>
</tr>
<tr>
<td>Shopping</td>
<td>4%</td>
</tr>
<tr>
<td>More / better accommodations – more availability</td>
<td>3%</td>
</tr>
<tr>
<td>More money / winning lottery or trip</td>
<td>2%</td>
</tr>
<tr>
<td>Hiking and walking trails / Better ATV trails</td>
<td>2%</td>
</tr>
<tr>
<td>Nothing</td>
<td>10%</td>
</tr>
<tr>
<td>Don’t Know</td>
<td>28%</td>
</tr>
</tbody>
</table>

With respect to winter travel, two subgroups in a total sample of 747 were asked about potential motivators:

- Individuals who never considered taking a winter vacation and hadn’t travelled in-province in the winter; and
those who never considered taking a winter vacation, but did actually indicate they took a vacation in the winter.

Similar to the fall season, survey respondents were unable to specify many motivators for winter trips, with 30% responding that they didn’t know and 24% indicating that there is nothing to motivate them. As well, 12% of respondents said that with a little help from “Mother Nature” (more snow), winter travel would be more appealing to them. However, a number of respondents did indicate that snowmobiling or snowmobiling packages (7%) and to a lesser extent skiing or skiing packages (3%) would get them to travel in the winter. Special events, cheaper flights, friends and family and more things to do, along with all-inclusive packages are also motivating for winter travellers. As with the fall season, most of the motivators identified would have an impact on only a small group of potential winter travellers, with snowmobiling being the most promising.

<table>
<thead>
<tr>
<th>Table 18: Winter Motivators</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Those who considered or took a Winter vacation -</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Winter</th>
<th>n=747</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weather / More snow</td>
<td>12%</td>
</tr>
<tr>
<td>Snowmobiling / snowmobiling packages</td>
<td>7%</td>
</tr>
<tr>
<td>Skiing / skiing packages</td>
<td>3%</td>
</tr>
<tr>
<td>Special events (concerts, festivals, sports)</td>
<td>2%</td>
</tr>
<tr>
<td>Cheaper flights</td>
<td>2%</td>
</tr>
<tr>
<td>Visiting with friends and family</td>
<td>2%</td>
</tr>
<tr>
<td>More things to do</td>
<td>2%</td>
</tr>
<tr>
<td>Activities with family and friends</td>
<td>2%</td>
</tr>
<tr>
<td>All-inclusive packages</td>
<td>2%</td>
</tr>
<tr>
<td>Time off work</td>
<td>2%</td>
</tr>
<tr>
<td>Nothing</td>
<td>24%</td>
</tr>
<tr>
<td>Don’t Know</td>
<td>30%</td>
</tr>
</tbody>
</table>

Stimulating spring travel appears to be even harder than stimulating fall and winter trip as two thirds of respondents were unable to provide a response at all, and of those who did respond, 39% didn’t know. Motivators identified by respondents also appear to be very limited. While 7% of respondents would appear that they can’t be motivated to travel in the spring at all, better weather is “required” to get at least 10% of respondents to travel during that season. This seems to be in line with residents’ weak perception of the province as a spring travel destination. However, as there are more than 1 in 3 residents who would consider travelling in the spring as reported earlier, this potential could be realized by having more attractions and activities available or open (11%) along with an offering of special events (7%). Time with family and friends / special occasions would motivate 8% of respondents while hunting and fishing would work for 6%. More time off work (3%) and all-inclusive packages (2%) would also get a small group of residents on the go in the Spring.
Table 19: Spring Motivators
- Those who considered or took a Spring vacation -

<table>
<thead>
<tr>
<th>Spring</th>
<th>n=725</th>
</tr>
</thead>
<tbody>
<tr>
<td>More attractions and activities available or open</td>
<td>11%</td>
</tr>
<tr>
<td>Better weather</td>
<td>10%</td>
</tr>
<tr>
<td>Time with family and friends / special occasions</td>
<td>8%</td>
</tr>
<tr>
<td>Special events (concerts, festivals, sports)</td>
<td>7%</td>
</tr>
<tr>
<td>Fishing / Hunting</td>
<td>6%</td>
</tr>
<tr>
<td>More time off work</td>
<td>3%</td>
</tr>
<tr>
<td>All-inclusive packages / getaways</td>
<td>2%</td>
</tr>
<tr>
<td>Discounts / reduced rates / cheaper gas</td>
<td>2%</td>
</tr>
<tr>
<td>Nothing</td>
<td>7%</td>
</tr>
<tr>
<td>Don’t Know</td>
<td>39%</td>
</tr>
</tbody>
</table>

Travel Packages and Special Promotions

Travel packages or special promotions are a crucial factor for many travellers. More than one-half (55%) indicated that travel packages or promotions are very or somewhat important when selecting a vacation destination within NL. Packages or promotions are at least somewhat important to a slightly greater percentage of rural travellers with 59% compared to 52% of urban travellers. They are also of slightly greater importance to residents who travelled inside NL only (59%) compared to those who travelled both inside and outside the province (52%).

n=1,388

Importance of Travel Packages and Promotions
- All Travelers -

- Very important: 24%
- Somewhat important: 34%
- Not very important: 19%
- Not at all important: 2%
- Don’t know/depends: 21%
Product Interests

General Activities

To find out what residents enjoy doing in general during vacation travel in their own province, they were asked what activities they are interested in when planning a trip in NL. Scenic touring and attending local entertainment topped the list, clearly indicating the two main vacation pursuits of residents. Visiting historic sites, museums or archeological sites, culinary experiences and visiting a National/Provincial Park round out the top five interests among resident travellers. City experiences are as important to residents as are nature-based activities such as trail/wilderness hiking and wildlife watching. Interest in ATV touring, hunting, kayaking/canoeing and golfing is limited to niche segments of survey respondents.

Table 20: Importance of Activities
- % always or often important -

<table>
<thead>
<tr>
<th>Top Mentions</th>
<th>Overall n=1095</th>
<th>St. John’s CMA n=386</th>
<th>Remainder of Province n=709</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scenic touring</td>
<td>55%</td>
<td>60%</td>
<td>52%</td>
</tr>
<tr>
<td>Attending local entertainment including live theatre, shows, festivals and events</td>
<td>55%</td>
<td>58%</td>
<td>53%</td>
</tr>
<tr>
<td>Visiting historic sites, museums, or archaeological sites</td>
<td>46%</td>
<td>47%</td>
<td>45%</td>
</tr>
<tr>
<td>Culinary experience/tasting local foods</td>
<td>42%</td>
<td>46%</td>
<td>39%</td>
</tr>
<tr>
<td>Visiting a National/Provincial Park</td>
<td>41%</td>
<td>50%</td>
<td>36%</td>
</tr>
<tr>
<td>City experiences (e.g. shopping, spa visits, pub or bar visits)</td>
<td>39%</td>
<td>35%</td>
<td>39%</td>
</tr>
<tr>
<td>Trail/wilderness hiking</td>
<td>39%</td>
<td>47%</td>
<td>34%</td>
</tr>
<tr>
<td>Wildlife viewing, including whale or bird watching</td>
<td>36%</td>
<td>40%</td>
<td>34%</td>
</tr>
<tr>
<td>Fishing</td>
<td>30%</td>
<td>27%</td>
<td>32%</td>
</tr>
<tr>
<td>Icebergs</td>
<td>28%</td>
<td>31%</td>
<td>25%</td>
</tr>
<tr>
<td>All Terrain Vehicle (ATV) touring</td>
<td>21%</td>
<td>18%</td>
<td>23%</td>
</tr>
<tr>
<td>Hunting</td>
<td>21%</td>
<td>15%</td>
<td>24%</td>
</tr>
<tr>
<td>Canoeing/Kayaking</td>
<td>15%</td>
<td>22%</td>
<td>11%</td>
</tr>
<tr>
<td>Golfing</td>
<td>12%</td>
<td>18%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Several differences in the relative importance of some activities were noted between St. John’s CMA residents and residents of other parts of the province. Some outdoor and nature-based activities, including scenic touring, visiting a national or provincial park, trail/wilderness hiking, wildlife viewing and icebergs are of much greater importance to residents of St. John’s CMA compared to residents from other areas of the province. On the other hand, city experiences as well as fishing, hunting and ATV touring are more critical for residents outside of the St. John’s CMA when planning to travel in the province. Differences among residents with respect to their travel activity interests are also evident when it comes to canoeing/kayaking and golfing which St. John’s CMA residents are about twice as likely to include in their travel plans as a “must-do” than residents from other regions in the province.
**Winter Activities**

Respondents who indicated they had taken an in-province winter trip (n=223) as well as those who had not but considered doing so (n=416), were asked about their interests for winter travel in the province. While snowmobiling clearly topped the list with 48% of respondents indicating that this activity is at least often important when planning a winter vacation in the province, downhill skiing was important to 22% of respondents. At 15 percent, snowshoeing is slightly more preferred by actual or potential winter travellers than cross country skiing (12%) while snowboarding appears to be a niche interest.

When comparing those who had already taken a winter trip with those who are considering a winter vacation, a number of differences between the two groups are evident. Among those considering a winter trip, interest in snowmobiling is even higher, with 51% indicating that this activity is of interest to them when planning an in-province winter trip. Snowshoeing and cross country skiing are also of greater importance among this group of respondents.

**Table 21: Winter Activities**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Considered but not taken a winter vacation n=416</th>
<th>Taken a winter vacation n=223</th>
<th>Labradorians (Considered or had taken a winter trip) n=132</th>
</tr>
</thead>
<tbody>
<tr>
<td>Snowmobiling</td>
<td>51%</td>
<td>43%</td>
<td>62%</td>
</tr>
<tr>
<td>Downhill skiing</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Snowboarding</td>
<td>6%</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>Cross country skiing</td>
<td>14%</td>
<td>9%</td>
<td>12%</td>
</tr>
<tr>
<td>Snowshoeing</td>
<td>17%</td>
<td>12%</td>
<td>21%</td>
</tr>
</tbody>
</table>
Among Labrador\(^2\) residents who took at least one winter vacation trip or considered doing so (n=132), at 62 percent, snowmobiling is an even more preferred activity, and “a must do activity” for 44% of respondents who indicated that it is always important during a winter vacation in the province. Snowshoeing is another popular vacation pursuit for more than 1 in 5 Labrador residents while downhill skiing is much less popular than among residents in general.

**Trans Labrador Highway**

Respondents were asked what impact the opening of the Trans Labrador Highway (TLH) would have on taking a vacation trip to/in Labrador. Seven in ten respondents at least somewhat agreed that they were more interested in a Labrador vacation now that the TLH was open. It is important to note that this question was only asked to those who research their travel plans (n=797) and not the total sample surveyed.

![More interested in taking a Labrador vacation since the completion of the TLH](image.png)

\(^2\) Based on total Labrador sample, including the oversample.
Section 12: Planning In-Province Vacation Travel

To understand planning behavior for in-province travel, survey respondents were asked about their habits and the tools they use when planning an in-province vacation. Only residents who travelled in the past two years and indicated that they intend to take a vacation trip in NL over the next twelve months were included the analysis (n=1095).

Decision to Travel in NL

Newfoundlanders and Labradorians who travelled and are planning an in-province trip, generally make their decision to travel in their home province on average 6 weeks in advance (average 6.3 weeks). Urban residents tended to decide further in advance compared to travellers from rural areas of the province. Additionally, residents who also travelled outside of the province decide further in advance compared to those who only travelled in-province.

Research Vacation Plans in NL

Many Newfoundlanders and Labradorians are making informed decisions with respect to their vacation travel. Sixty percent of past travellers and potential in-province travellers indicated they research their vacation plans in advance. Residents of St. John’s CMA were significantly more likely to do some research in advance (67%) compared to travellers from other areas of the province (56%).
Research Plans for Vacation Travel in NL
- Past Travellers and Intenders -

![Graph showing research plans for vacation travel in NL.]

Research Lead Time for NL Vacation Travel

Past travellers likely to take an in-province trip who seek information on their trip (n=629), do so, on average 8.0 weeks in advance (approximately two months). At 8.6 weeks, urban residents start planning in advance over week earlier than their rural counterparts at 7.3 weeks. This drops to 6.7 weeks for those who have travelled only within the province in the past two years while travellers who also visited destinations outside NL begin researching almost a week and a half earlier at 8.1 weeks. Travellers who only travelled out-of province in the past two years but are intending to take a vacation trip in the province start looking for information even earlier — just over 11 weeks in advance (note that this is a result based on a small sample size).

Research Lead Time
- Mean Value in Weeks -
- Past travelers and intenders -

<table>
<thead>
<tr>
<th>Category</th>
<th>Mean Value in Weeks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urban (n=334)</td>
<td>8.6</td>
</tr>
<tr>
<td>Rural (n=283)</td>
<td>7.3</td>
</tr>
<tr>
<td>In-Province Only (n=148)</td>
<td>6.7</td>
</tr>
<tr>
<td>Out-of-Province Only (n=63)</td>
<td>11.2</td>
</tr>
<tr>
<td>Both (n=406)</td>
<td>8.1</td>
</tr>
</tbody>
</table>

* Don't knows and refusals (n=12) are excluded from mean calculation
Trip Planning Tools for NL Vacation Travel

As previously noted, 60% of past travellers intending to take a NL vacation trip over the next twelve months indicated that they generally research vacation trips in NL. This subgroup was subsequently asked a series of questions related to the tools and sources used during their planning process as well as during the actual vacation. A list of specific planning tools was read to respondents to determine the frequency of use both in the planning stage and during the vacation itself.

**Tools Used in the Planning Stage**

Recommendations from family and friends is the most frequently used information source, with two-thirds of trip planners indicating they use it frequently (ratings of 8, 9 or 10 on a scale of 1 to 10, with 1=Do not use at all and 10=Use very frequently). Only 1% of travellers indicated that they do not use this source at all. Use of websites other than the official provincial tourism website and online review websites are also frequently used by about half of travellers during the planning stage.

Although the Internet is an important planning tool for many travellers, ‘traditional’ print materials also receive consideration: Over one in three travellers (35%) use event or attraction specific printed brochures/materials, with only 6% not using these materials at all. In addition, the province’s travel guide and the seasonal direct mail brochure are frequently used by about one quarter of respondents.

While over one quarter of travellers indicated they frequently use social networks in their trip planning, this planning tool ranked lowest with respect to its overall frequency of use (4.5). As well, 34% of respondents indicated that they do not use social networks at all for trip planning.

*Table 22: Trip Planning Tools - Planning Stage -

<table>
<thead>
<tr>
<th>Top Mentions</th>
<th>Mean Rating* (n=629)</th>
<th>Frequent use (rating of 8, 9 or 10) (n=629)</th>
<th>Did not use (n=629)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recommendations from friends or family</td>
<td>8.0</td>
<td>67%</td>
<td>1%</td>
</tr>
<tr>
<td>Other websites</td>
<td>6.8</td>
<td>52%</td>
<td>16%</td>
</tr>
<tr>
<td>Online review websites</td>
<td>6.4</td>
<td>48%</td>
<td>18%</td>
</tr>
<tr>
<td>Event or attraction-specific printed brochures/material</td>
<td>6.3</td>
<td>35%</td>
<td>6%</td>
</tr>
<tr>
<td>Newfoundlandlabrador.com</td>
<td>5.6</td>
<td>37%</td>
<td>22%</td>
</tr>
<tr>
<td>Seasonal direct mail brochure “For the Love of NL”</td>
<td>5.1</td>
<td>24%</td>
<td>21%</td>
</tr>
<tr>
<td>NL Travellers’ Guide “Lost and Found”</td>
<td>4.6</td>
<td>27%</td>
<td>38%</td>
</tr>
<tr>
<td>Social networks (Facebook, Twitter, travel blogs, YouTube)</td>
<td>4.5</td>
<td>28%</td>
<td>34%</td>
</tr>
</tbody>
</table>

*includes ratings of 1, did not use, but excludes Don’t Knows and refusals

It should be noted that “other websites” was asked of respondents following the reading of “Newfoundlandlabrador.com”. No specific examples of other websites or online review websites were provided to respondents. Given the high percentage of those who plan using these tools, additional investigation is warranted to better understand what websites are being used and what information needs are being fulfilled.
From a regional perspective, there are a few differences with respect to the tools used for travel planning. Among the top three information sources used, residents of St. John’s CMA and Labradorians use online review websites more frequently (ranked #3 information source) while residents of other regions of the province prefer the use of event or attraction specific brochures/material (ranked #3 information source by those respondents). As well, Labradorians appear to make less use of some of the ‘traditional’ print materials, including the provincial travel guide “Lost and Found” and the seasonal direct mail brochure “For the love of NL” than other residents. Interestingly, Labradorians are more inclined to use social networks for in-province travel planning and are less inclined to use the province’s official tourism website than other residents.

<table>
<thead>
<tr>
<th>Top Mentions</th>
<th>Mean Rating* Travellers who research</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>St. John’s CMA (n=250)</td>
</tr>
<tr>
<td>Recommendations from friends or family</td>
<td>8.0</td>
</tr>
<tr>
<td>Other websites</td>
<td>7.0</td>
</tr>
<tr>
<td>Online review websites</td>
<td>6.7</td>
</tr>
<tr>
<td>Event or attraction-specific printed brochures/material</td>
<td>6.0</td>
</tr>
<tr>
<td>Newfoundlandlabrador.com</td>
<td>5.9</td>
</tr>
<tr>
<td>Seasonal direct mail brochure “For the Love of NL”</td>
<td>4.7</td>
</tr>
<tr>
<td>NL Travellers’ Guide “Lost and Found”</td>
<td>4.1</td>
</tr>
<tr>
<td>Social networks (Facebook, Twitter, travel blogs, YouTube)</td>
<td>4.6</td>
</tr>
</tbody>
</table>

*includes ratings of 1, did not use, Don’t knows and refusals are removed for mean calculations.

Tools Used During the Trip

When it comes to tools being used during NL vacation trips, printed maps (other than those in the travel guide) and event or attraction-specific printed brochures are the top sources of information. Printed maps are frequently used by 44% of travellers, but almost 17% travel planners do not use them at all. Event or attraction specific printed brochures are popular information sources for more than one third of respondents, with only 10% stating that they do not use these materials. Rounding out the top three information sources during an in-province vacation trip, visitor information centres are used frequently by about 1 in 3 travellers who engage in trip planning. On the other end of the spectrum, respondents are less inclined to use GPS technology, social networks or mobile travel applications during their trip. Overall, these tools are not only less frequently used in general but are also not used at all by more than half of those travellers who generally plan their in-province vacations.

3 Based on total Labrador sample, including the oversample.
Table 24: Trip Planning Tools  
- Past travellers and intenders who research vacation plans - 
- During Trip - 

<table>
<thead>
<tr>
<th>Top Mentions</th>
<th>Mean Rating* (n=629)</th>
<th>Frequent use (rating of 8, 9 or 10) (n=629)</th>
<th>Did not use (n=629)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Printed maps (excluding those in the travel guide)</td>
<td>6.2</td>
<td>44%</td>
<td>17%</td>
</tr>
<tr>
<td>Event or attraction-specific printed brochures/material</td>
<td>6.1</td>
<td>35%</td>
<td>10%</td>
</tr>
<tr>
<td>Visitor Information Centres</td>
<td>5.7</td>
<td>32%</td>
<td>17%</td>
</tr>
<tr>
<td>Seasonal direct mail brochure “For the Love of NL”</td>
<td>4.3</td>
<td>19%</td>
<td>34%</td>
</tr>
<tr>
<td>NL Travellers’ Guide “Lost and Found”</td>
<td>4.1</td>
<td>23%</td>
<td>44%</td>
</tr>
<tr>
<td>Newfoundlandlabrador.com</td>
<td>4.1</td>
<td>21%</td>
<td>42%</td>
</tr>
<tr>
<td>GPS technology</td>
<td>3.9</td>
<td>26%</td>
<td>52%</td>
</tr>
<tr>
<td>Social networks (Facebook, Twitter, travel blogs, YouTube)</td>
<td>3.7</td>
<td>18%</td>
<td>48%</td>
</tr>
<tr>
<td>Mobile travel applications</td>
<td>3.0</td>
<td>15%</td>
<td>63%</td>
</tr>
</tbody>
</table>

*includes ratings of 1, did not use; Don’t knows and refusals are removed for mean calculations.

While the top three tools used during vacations are fairly consistent across the various regional segments (with the exception of Labradors’ #3 ranked tool – GPS technology), there are some differences among respondents depending on their region of residence. As in the planning stage, residents outside St. John’s CMA are more inclined to use the direct mail brochure and the provincial travel guide. On the other hand, they are less inclined to use mobile travel applications. Interestingly, St. John’s CMA residents are the most frequent users of printed maps and the least frequent users of GPS technology and social networks which are much more preferred by Labrador residents.

Table 25: Trip Planning Tools for Vacation Travel in NL by Region  
- In-province travellers and Intenders who seek information - 
- During Trip - 

<table>
<thead>
<tr>
<th>Top Mentions</th>
<th>Mean Rating Travellers who research</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>St. John’s CMA (n=250)</td>
</tr>
<tr>
<td>Printed maps (excluding those in the travel guide)</td>
<td>6.3</td>
</tr>
<tr>
<td>Event or attraction-specific printed brochures/material</td>
<td>6.0</td>
</tr>
<tr>
<td>Visitor Information Centres</td>
<td>5.7</td>
</tr>
<tr>
<td>Seasonal direct mail brochure “For the Love of NL”</td>
<td>3.8</td>
</tr>
<tr>
<td>Newfoundlandlabrador.com</td>
<td>4.3</td>
</tr>
<tr>
<td>NL Travellers’ Guide “Lost and Found”</td>
<td>3.8</td>
</tr>
<tr>
<td>GPS technology</td>
<td>3.9</td>
</tr>
<tr>
<td>Social networks (Facebook, Twitter, travel blogs, YouTube)</td>
<td>3.6</td>
</tr>
<tr>
<td>Mobile travel applications</td>
<td>3.5</td>
</tr>
</tbody>
</table>

*includes ratings of 1, did not use; Don’t knows and refusals are removed for mean calculations.

4 Based on total Labrador sample, including the oversample.
Comparison of Tools Used

A number of tools were investigated for their use in both planning and actual trip stages. When comparing the use of these sources and tools at each stage of the trip, it is interesting to note that the official provincial tourism website plays a much more dominant role in trip planning than during the trip, with 37% of respondents indicating frequent use during planning and only 21% indicating the website’s use during the trip. On a smaller scale, this appears to be also true for the use of social networks. While the travel guide and the direct mail brochure are still somewhat more important for travellers during the planning stage, event and attraction specific printed brochures are of equal importance during planning and during the actual trip.
Conclusions

Findings

Travel Attitudes

- Vacation travel is valued and deemed important by the majority of Newfoundlanders and Labradorians and therefore opportunities to enable it would be welcome.

- Vacation travel is regarded more important among those who travel out-of-province only as well as among those who took vacations both in and outside the province. As well, more of those who have travelled on vacation in the past two years indicate that vacation is important to them.

- Many of the barriers to travel in-province appear uncontrollable, e.g. more time, more money, but can potentially be influenced by the right product or experience offer as the desire to travel is genuinely there.

- Residents who take vacation trips are not inclined to travel on impulse and are “deal-conscious”.

- When it comes to vacation in general (both in and out-of province), prearranging vacations, hunting for bargains and seeking all-inclusive packages are important to travellers. There is some appetite among travellers to take their long vacation outside of the summer months as well as a preference to take multiple short trips (instead of one long one).

- The key activities that form part of the provincial brand are preferred by almost all vacationers-outdoor activities, exploring history and learning about the lifestyle, heritage, arts and culture of the people.

- A majority of residents also looks for travel experiences that include family activities, city activities as well as festivals or special events.

Extent of Travel by Residents

- A significant portion (77%) of Newfoundlanders and Labradorians travel for vacation and pleasure purposes, with 64% having taken at least one vacation trip within the province in the past two years.

- With an average of 5.0 trips taken over the two-year period, there is propensity to travel among provincial residents. More in-province vacation trips were taken on average (3.9) compared to out-of-province vacation trips (average of 2.5).
The three most visited regions in the province over the past two years (based on the percentage of travellers who took at least one trip to that region) were the Western region (52%), the Central region (46%) and St. John’s CMA (38%). St. John’s CMA residents represented the highest proportion of visitors to all regions with the exception of Labrador and the St. John’s CMA itself.

In terms of travel distance, there is some propensity towards shorter trips and travelling in one’s “own backyard”, with more in-province travellers travelling in their own region the further west they reside.

**Perceptions of Newfoundland and Labrador as a Vacation Destination**

- Among residents who value vacation, the key attributes of NL that make it a great vacation destination align with the core messages currently being promoted to potential non-resident travellers — outdoor activities, scenic touring, history and culture and unique vacation experiences. Residents also perceive the province strongly as a destination offering local festivals and events.

- Perceptions of the province as a place to vacation outside of the summer months provide a challenge to encourage shoulder season and winter travel in the province.

- While the province is seen as a destination offering good value for money in general, fewer urban travellers feel that way compared to their rural counterparts.

- In-province vacation was a positive experience for those who undertook it and is likely to be recommended to others. It is reasonable to assume that as long as time and money are available, those who currently travel in-province are likely to continue to do so.

**Traveller versus Non-traveller Profiles**

- Resident travellers (including those who travel outside the province only) tend to be more educated and have higher average annual household incomes. Forty-one percent of travellers are between 35 and 54 years old. Residents aged 55 or older represented another 32% of recent travellers.

- Residents aged 55 or older, generally, are more likely to be non-travellers than travellers. More than half of non-travellers indicated having average annual household incomes of less than $40,000 and almost half of them reported their level of education as a high school or less.

- While almost two in five travellers live in St. John’s CMA, residents of the Western and Avalon regions appear to be as likely to be travellers as they are non-travellers and residents of the Eastern and Central regions are much more likely to be non-travellers than travellers. Labrador is the only other region besides St. John’s CMA with a higher share of travellers than non-travellers.
Potential for In-province Travel

- There is potential for in-province vacation travel, with 71% of all residents indicating that they probably or definitely will travel for vacation purposes in the province within the next 12 months. While this is positive for future travel, the challenge remains to increase the amount of travel among residents.

- The 13% of residents who have only taken vacation trips outside of the province will be the most difficult group to convince to travel within the province as they perceive the province to offer less of what they are looking for.

- Perceptions of the province as mainly a summer vacation destination provide a challenge to encouraging more travel outside the summer season. Survey results indicate that the fall season offers the best potential with relatively more individuals having historically travelled during this season compared to spring and winter. Many residents are already multi-season travellers.

- With snowmobiling being by far the #1 vacation pursuit among those who have travelled or would consider travelling during the winter, there is some opportunity for snowmobiling to stimulate in-province winter travel.

Trip Motivators

- Scenic touring, shopping and trail/wilderness hiking were the top activities undertaken during travellers’ most recent vacation in the province while scenic touring, attending local entertainment and visiting historic sites, museums or archeological sites are residents’ top three interests for in-province vacations in general.

- Scenic touring, shopping and visiting family and friends were the top three prime motivators for respondents’ recent in-province travel, but only 11% noted these activities as motivators. Overall, the list of trip motivating activities was diverse, with many activities being mentioned by just one percent or less of in-province travellers.

- Travel packages or special promotions for NL vacations were deemed important by just over half of those who travel, which is consistent with the desire for “getting a deal” noted as important by travellers when vacationing in general.

- The current marketing campaign enjoys much awareness and it does influence the majority of travellers in their desire to travel in the province.

Travel Planning Behaviour

- In-province vacation travel is planned and appears to be less spur-of-the moment with an average advance planning time of almost two months (8.0 weeks). Rural resident travellers (7.3) and those who travel within the province only (6.7) do not plan quite as far in advance.
Recommendations from trusted sources such as family and friends are the primary planning tool. While currently only 28% of those who research their in-province vacation plans frequently use social networks, almost two-thirds of in-province vacation planners did use this tool overall, opening new opportunities in addressing travellers’ information needs.

Use of online sources for planning ranks second behind recommendations from family and friends. Event and attraction-specific information is used almost as frequently prior to as during trips while the travel guide tends to be consulted more frequently during the planning stages.

Suggestions

- Target those who have travelled in the past.

- Make it easy for people to make their arrangements and provide mechanisms to help them feel that they are “getting a good deal”.

- To encourage more in-province travel, further investigation is needed to explore what needs of those who travel out-of-province are satisfied by out-of-province travel and how these needs could be fulfilled by travelling at home.

- Utilize the appeal of taking more, shorter trips, to stimulate and increase the frequency of in-province travel.

- Fewer of those who vacation only outside the province prefer outdoor activities, and relatively more of this group prefer vacations that include city activities such as sightseeing, shopping and visiting restaurants and bars. This will affect messaging aimed at this group should they be targeted for in-province travel.
Appendix A: Questionnaire

Good afternoon/evening, my name is ________ from MarketQuest-Omnifacts Research. Today we are conducting a survey with Newfoundland and Labrador residents to discuss travel and travel intentions on behalf of the Department of Tourism Culture and Recreation. We are looking to speak with the person in the household 18 years of age or older who has the next birthday. Would that be yourself?

01 Yes  Continue
02 No  Ask for target respondent

If Asked:

How long is the survey? The survey will take approximately 15-20 minutes depending on your answers. We can begin and if you would prefer, we can complete the survey in two parts.

1. Gender (By Observation):

01 Male
02 Female

2a. In what year were you born? _____________ Go to Q3

99 Refused Continue

2b. In which of the following broad age categories do you fall? READ LIST

01 18-24
02 25-34
03 35-44
04 45-54
05 55-64
06 65+

Voluntary
97 Don’t know/No Answer
99 Refused
TravelMotivatorsandAttitudes

I’d like to start with a couple of questions about your attitudes regarding travel.

3. Generally speaking, how important is vacation travel to you? Would you say it is? READ LIST

01 Very important
02 Somewhat important
03 Not very important
04 Not at all important

Voluntary
98 Don’t know/No answer
99 Refused
IF Q3=03, 04, 98 OR 99, GO TO Q6
ELSE, CONTINUE

4. Now, I’m going to read a list of statements about travel preferences and behaviors. Please indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each statement as it pertains to your personal travel preferences and behaviors. READ AND ROTATE LIST

a. Outdoor activities and interaction with nature are important to me when I travel on my vacation
b. Learning about the lifestyle, heritage, arts, culture and the people of a destination is important to me when I travel on my vacation
c. It is important that my destination has many activities and attractions for families and children
d. I prefer city activities such as sightseeing, shopping, visiting restaurants and bars
e. I enjoy exploring history and visiting historic sites and attractions on my vacation
f. I usually visit specific places to attend festivals or special events
g. I prefer a “package” vacation where the cost includes all/most items related to my vacation (transportation, accommodations and an itinerary of activities and attractions)
h. I usually look for vacation bargains and special promotions when planning my vacation
i. I like to make all my travel arrangements before I start my vacation
j. I prefer to take a number of short trips instead of one long one
k. I like to plan vacation travel around business trips
l. I only take my longest vacation during the summer months

01 Strongly agree
02 Somewhat agree
03 Somewhat disagree
04 Strongly disagree

Voluntary
98 Don’t know/No answer
99 Refused
The next question relates to your views about Newfoundland and Labrador as a vacation destination.

5. Based on your experience, or your general impressions from anything you have seen, read, or heard, how would you rate Newfoundland and Labrador as a vacation destination. Please rate the Province, using a 10-point scale where 1 is ‘very poor’ and 10 is ‘excellent’, as a vacation destination for:

**READ AND ROTATE LIST**

- a. Having things to see and do for families and children
- b. Offering local festivals and events
- c. Outdoor and nature-based activities, including walking and hiking
- d. Opportunities, activities and attractions to experience winter travel/trips
- e. Opportunities, activities and attractions to experience fall travel/trips
- f. Opportunities, activities and attractions to experience spring travel/trips
- g. Sightseeing/scenic driving tours
- h. Activities and attractions to learn about the history and culture
- i. Offering culinary experiences / having exceptional food
- j. Providing suitable infrastructure, facilities and travel services that meet my vacation needs
- k. Getting good value for the money
- l. Offering a different or unique vacation experience

Very poor

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Don't know / No answer | 98 |

Incidence

As previously mentioned, this survey is about vacation and pleasure travel. For the remainder of the survey, vacation/pleasure trips are **planned overnight** trips taken for vacation or pleasure and include get-away weekends, pleasure trips taken as part of business trips and trips to visit friends and relatives.

Trips NOT included are regular weekend trips to a family cottage or cabin or special camping place, **regular** and **routine** trips for work/business, trips to visit friends or relatives, trips to participate in sports or other competitions, and any other **regular** and **routine** trips.

6. In the **past two years** have you travelled for vacation or pleasure, including visiting friends and relatives?

*If asked: The past two years refers to the period of January 1, 2009 to October 31, 2010.*

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Yes</td>
</tr>
<tr>
<td>02</td>
<td>No</td>
</tr>
</tbody>
</table>
Travel Behaviours

Next, a few questions about your vacation and pleasure travel within the past two years. Please remember that we are looking for information on vacation or pleasure trips using the definition provided earlier.

7a. In the past two years, how many of these vacation or pleasure trips have you taken within Newfoundland and Labrador?

_________ RECORD NUMBER OF TRIPS

95 None Go to Q8a
98 Don’t know Go to Q8a

[Programming note: Ask Q7b-Q7e for each trip provided in Q7a, up to a maximum of 6 trips.]

7b. What was/were the primary destination(s) of your <RECALL 7a> trip(s)?

[ALLOW FOR 6 MENTIONS. IF MORE, RECORD MOST RECENT 6]

Interviewer note: If the respondent indicates identifies more than one specific location/primary destination during the same trip...and spend equal time in each destination, record both destinations as part of the same trip.

01 ____________________________
02 ____________________________
03 ____________________________
04 ____________________________
05 ____________________________
06 ____________________________

[Coding note: Code the community/place verbatim and also code the region in which it is located. Region categories to be determined]

7c. How many nights did you spend away from home on your trip to <RECALL 7b_1 to 7b_6>?

[For EACH trip mentioned in 7b]

Interviewer note: If the respondent indicates identifies more than one specific location/primary destination during the same trip...and spend equal time in each destination, record the total number of nights spent in both locations.

_________ RECORD NUMBER OF NIGHTS
7d. In what month did you start your trip to <RECALL 7b_1 to 7b_6>?
[For EACH trip mentioned in 7b]
01 January
02 February
03 March
04 April
05 May
06 June
07 July
08 August
09 September
10 October
11 November
12 December
98 Don’t Know

7e. In what year did you start your trip to <RECALL 7b_1 to 7b_6>?
[For EACH trip mentioned in 7b]

__________ RECORD YEAR

8a. In the past two years, how many vacation or pleasure trips have you taken outside Newfoundland and Labrador, including trips in Canada and outside Canada? Please remember that we are looking for information on vacation or pleasure trips using the definition provided earlier.

__________ RECORD NUMBER OF TRIPS

95 None Go to skip before Q9a
98 Don’t know Go to skip before Q9a

8b. What was/were the primary destination(s) of your <RECALL 8a> trip(s)?

[ALLOW FOR 6 MENTIONS. IF MORE, RECORD MOST RECENT 6]

01 __________________________
02 __________________________
03 __________________________
04 __________________________
05 __________________________
06 __________________________

[Coding note: Code the community/place verbatim and also code the region in which it is located. Region categories to be determined]
IF Q7a=0, 95 or 98, CONTINUE
ELSE, GO TO SKIPS BEFORE Q10a
9a. Earlier, you indicated that within the past two years, you have not taken any vacation or pleasure trips within Newfoundland and Labrador. In a typical two-year period, would you say you never, rarely, occasionally, or frequently take vacation trips, as defined in this survey, within Newfoundland and Labrador

01 Never  Continue
02 Rarely  Go to skip before Q10a
03 Occasionally or  Go to skip before Q10a
04 Frequently  Go to skip before Q10a

9b. Why don’t you take any vacation/pleasure trips within Newfoundland and Labrador within a typical two-year period? DO NOT READ LIST, SELECT ALL THAT APPLY

01 Can’t afford to travel/financial reasons
02 Too busy/no time/no vacation time
03 Personal reasons (e.g., illness, family problems, pregnant, young children, too old)
04 No interest in travel/ have other priorities
05 No reason to travel now
06 Worried about losing my job
07 Poor economy
08 Travel outside of NL for these type of vacations
09 Too expensive to travel within NL for vacation
10 Have visited everywhere I want to already
11 Poor weather
10 Other (specify____________________)
98 Don’t know
99 Refused

IF Q7d=09, 10 OR 11 FOR ANY TRIP, GO TO Q10b
ELSE, CONTINUE

10a. Have you ever considered taking a vacation/pleasure trip in Newfoundland and Labrador during the Fall?

01 Yes  Go to skip before Q11a
02 No  Continue

10b. IF Q10a=02, READ: What would motivate you or make you more inclined to consider taking a vacation/pleasure trip in Newfoundland and Labrador during the Fall?

IF Q7d=09, 10 OR 11, READ: What would motivate you or make you more inclined to consider taking another vacation/pleasure trip in Newfoundland and Labrador during the Fall?

RECORD RESPONSE

Note: (Winter = Dec, Jan, Feb, Mar; Spring = Apr & May)
Final Report - 2010 Resident Travel Survey

IF Q7d=12, 01 OR 02 OR 03 FOR ANY TRIP, GO TO Q11b
ELSE, CONTINUE

11a. Have you ever considered taking a vacation/pleasure trip in Newfoundland and Labrador during the Winter?

   01 Yes  Go to skip before Q12a
   02 No  Continue

11b. IF Q11a=02, READ: What would motivate you or make you more inclined to consider taking a vacation/pleasure trip in Newfoundland and Labrador during the Winter?

   IF Q7d=12, 01 OR 02 OR 03, READ: What would motivate you or make you more inclined to consider taking another vacation/pleasure trip in Newfoundland and Labrador during the Winter?

   RECORD RESPONSE

IF Q7d=04 OR 05 FOR ANY TRIP, GO TO Q12b
ELSE, CONTINUE

12a. Have you ever considered taking a vacation/pleasure trip in Newfoundland and Labrador during the Spring?

   01 Yes  Go to skip before Q13
   02 No  Continue

12b. IF Q12a=02, READ: What would motivate you or make you more inclined to consider taking a vacation/pleasure trip in Newfoundland and Labrador during the Spring?

   IF Q7d=04 OR 05, READ: What would motivate you or make you more inclined to consider taking another vacation/pleasure trip in Newfoundland and Labrador during the Spring?

   IF Q7a=0, 95 or 98, GO TO Q19
ELSE, CONTINUE

Last Vacation Within Newfoundland and Labrador

The next few questions relate specifically to your last vacation/pleasure trip in Newfoundland and Labrador.

13a. Just to confirm, your last vacation/pleasure trip in Newfoundland and Labrador was...

   [Programming Note: PRESENT LIST FROM Q7, with Month and Year and have interviewer select the trip]

   Interviewer note: If the respondent indicates multiple trips to the same primary destination, please choose the most recent trip as indicated by the year and month travelled.
13b. What type of accommodations did you stay in?  

**DO NOT READ LIST, SELECT ALL THAT APPLY**

01 Hotel/Motel  
02 Campground  
03 Bed & Breakfast  
04 Commercial Cottage/Cabin  
05 Private Cottage/Cabin  
05 Friend or family's house  
90 Other (specify _______________________)  

14a. What activities did you include in your vacation?  

**DO NOT READ LIST, SELECT ALL THAT APPLY**  

Probe at least three times...Is there anything else?

14b. Which, if any, of these activities was the **prime** motivator for this trip? By prime motivator I mean what was the most important activity that influenced your decision to travel?  

**DO NOT READ LIST, SELECT ONLY ONE RESPONSE**

a. Scenic touring  
b. Icebergs  
c. Wildlife viewing, including whale and bird watching  
d. Pleasure walking in/around communities  
e. Trail/wilderness hiking  
f. Visiting a National/Provincial park  
g. Camping  
h. Golfing  
i. All Terrain Vehicle (ATV) touring  
j. Snowmobiling  
k. Downhill skiing  
l. Snowboarding  
m. Cross country skiing  
n. Snowshoeing  
o. Canoeing/kayaking  
p. Shopping  
q. Attending local entertainment such as music or theatre performances and live shows  
r. Visiting historic sites, museums, or archaeological sites  
s. Attending local festivals/events  
t. Visiting pubs, bars, or nightclubs  
u. Visiting a spa  
v. Hunting  
w. Fishing  
x. Culinary experience/tasting local foods  
y. Other (specify)  
z. No activities *(Q14a only; if selected, do not ask Q14b)*  
aa. None of the activities *(Q14b only)*
16. For this vacation, which of the following best describes your travel party?

*Interviewer Note: Children are defined as those under the age of 18*

01 Alone
02 Couple, no children
03 Couple with children
04 2 or more couples, no children
05 2 or more couples, with children
06 Other family members
07 Group of friends (includes combinations of family & non-family).
08 Business associates
90 Other (please specify)________________________

**Voluntary**
99 Refused

17a. How satisfied were you with your last vacation within Newfoundland and Labrador? Please use a scale of 1 to 10 where 1 is ‘completely dissatisfied’ and 10 is ‘completely satisfied’.

<table>
<thead>
<tr>
<th>Completely dissatisfied</th>
<th>Completely satisfied</th>
<th>Don’t know / No answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 2 3 4 5 6 7 8 9 10 98</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

17b. [If rating of 5 or less in Q17a] And, why do you feel that way? **RECORD RESPONSE**

18a. How likely are you to recommend vacationing in Newfoundland and Labrador to others? Please use a scale of 1 to 10 where 1 means ‘extremely unlikely’ and 10 is ‘extremely likely’.

<table>
<thead>
<tr>
<th>Extremely unlikely</th>
<th>Extremely likely</th>
<th>Don’t know / No answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 2 3 4 5 6 7 8 9 10 98</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

18b. [If rating of 5 or less in Q18a] And, why do you feel that way? **RECORD RESPONSE**
Likelihood of Intra-Provincial Travel

The next questions are about your vacation or pleasure travel intentions within the next twelve months.

Please remember that vacation/pleasure trips are planned overnight trips taken for vacation or pleasure and include get-away weekends, pleasure trips taken as part of business trips and trips to visit friends and relatives.

Trips NOT included are regular weekend trips to a family cottage or cabin or special camping place, regular and routine trips for work/business, trips to visit friends or relatives, trips to participate in sports or other competitions, and any other regular and routine trips.

19. Over the next twelve months, would you say you definitely will, probably will, probably will not, or definitely will not take such a vacation within Newfoundland and Labrador?

01 Definitely will Continue
02 Probably will Continue
03 Probably will not Go to skip before Q20
04 Definitely will not Go to skip before Q20

19b. What time of year are you likely to take such a vacation/pleasure trip in Newfoundland and Labrador SELECT ALL THAT APPLY

01 January Go to skip before Q22
02 February Go to skip before Q22
03 March Go to skip before Q22
04 April Go to skip before Q22
05 May Go to skip before Q22
06 June Go to skip before Q22
07 July Go to skip before Q22
08 August Go to skip before Q22
09 September Go to skip before Q22
10 October Go to skip before Q22
11 November Go to skip before Q22
12 December Go to skip before Q22
98 Don’t Know Go to skip before Q22

IF Q9a=01 (NEVER), GO TO Q21
ELSE CONTINUE
20. Why are you unlikely to take a vacation in Newfoundland and Labrador within the next twelve months? DO NOT READ LIST, SELECT ALL THAT APPLY

01 Can’t afford to travel/financial reasons
02 Too busy/no time/no vacation time
03 Personal reasons (e.g., illness, family problems, pregnant, young children, too old)
04 No interest in travel/ have other priorities
05 No reason to travel now
06 Worried about losing my job
07 Poor economy
08 Travel outside of NL for these type of vacations
09 Too expensive to travel within NL for vacation
10 Have visited everywhere I want to already
11 Poor weather
90 Other (specify____________________)
98 Don’t know
99 Refused

21. What, if anything, would motivate you to plan a vacation within Newfoundland and Labrador within the next twelve months? PROBE FOR DETAIL

RECORD RESPONSE

97 Nothing

IF Q6=02 (NON-TRAVELLER), GO TO Q31 (DEMOGRAPHICS)
Q7a=0, 95 OR 98 AND Q9a=01 AND Q10a=02 AND Q11a=02 AND Q12a=02 AND Q19=04 AND Q21=97,
GO TO Q27
ELSE, CONTINUE

Trip Planning in Newfoundland and Labrador

22. Would you say travel packages or special promotions are very important, somewhat important, not very important or not at all important when selecting a vacation destination within Newfoundland and Labrador?

01 Very important
02 Somewhat important
03 Not very important
04 Not at all important

Voluntary
05 It depends (specify____________________)
98 Don’t know/No answer
99 Refused
IF Q7d=12 OR 01 OR 02 OR 03, ASK Q23a
IF Q11a=01, ASK Q23a
ELSE, GO TO Q23b

23a. Please indicate how important each of the following activities is to you when planning a Winter vacation or pleasure trip in Newfoundland and Labrador? Would you say the following is **always important, often important, sometimes important** or **never important** to you? **READ AND ROTATE LIST**

a. Snowmobiling
b. Downhill skiing
c. Snowboarding
d. Cross country skiing
e. Snowshoeing

23b. Please indicate how important each of the following activities is to you in **general** when planning a vacation or pleasure trip in Newfoundland and Labrador? Would you say the following are **always important, often important, sometimes important** or **never important** to you? **READ AND ROTATE LIST**

a. Scenic touring
b. Icebergs
c. Wildlife viewing, including whale or bird watching
d. Trail/wilderness hiking
f. Visiting a National/Provincial park
g. Golfing
h. All Terrain Vehicle (ATV) touring
i. Canoeing/kayaking
j. City experiences (e.g. shopping, spa visits, pub or bar visits)
k. Attending local entertainment including live theatre, shows, festivals and events
l. Visiting historic sites, museums, or archaeological sites
m. Hunting
n. Fishing
o. Culinary experience/tasting local foods
p. Other (specify)

01 Always important
02 Often important
03 Sometimes important
04 Never important

Voluntary
98 Don’t know/No answer
99 Refused
For the next couple of questions, please think about your general trip planning behavior.

24. In general, when you decide to take a vacation/pleasure trip in Newfoundland and Labrador, how far in advance of the actual trip do you make the decision to travel?

__________ NUMBER OF DAYS/ WEEKS / MONTHS

25a. For vacation/pleasure trips in Newfoundland and Labrador, do you generally research your vacation plans before taking the trip?

<p>| | | | | | | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>01 Yes</td>
<td>Continue</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>02 No</td>
<td>Go to Q28</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Voluntary
98 Don’t know No Answer  Go to Q28
99 Refused  Go to Q28

25b. For vacation/pleasure trips in Newfoundland and Labrador, how far in advance do you seek information or research your trip?

__________ NUMBER OF WEEKS / MONTHS

<p>| | | | | | | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>98 Don’t know No Answer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>99 Refused</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

26a. You may use a variety of tools and sources when planning your Newfoundland and Labrador trip. From the following list, please indicate how frequently, if at all, you use these tools and sources when planning your trip. Please use a 10-point scale where 1 is ‘do not use at all’ and 10 is ‘use very frequently’.

<table>
<thead>
<tr>
<th>Do Not Use at All</th>
<th>Use Very Frequently</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1 2 3 4 5 6 7 8 9 10</td>
</tr>
<tr>
<td>newfoundlandlabrador.com – official website of the Department of Tourism, Culture and Recreation</td>
<td>□ □ □ □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>Other websites</td>
<td>□ □ □ □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>Social networks (e.g. Facebook, Twitter, travel blogs, YouTube)</td>
<td>□ □ □ □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>Newfoundland and Labrador Travellers’ Guide “Lost and Found”</td>
<td>□ □ □ □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>Online review websites</td>
<td>□ □ □ □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>Event or attraction-specific printed brochures/material</td>
<td>□ □ □ □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>Recommendations from friends or family</td>
<td>□ □ □ □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>Seasonal direct mail brochure “For the Love of NL”</td>
<td>□ □ □ □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>□ □ □ □ □ □ □ □ □ □</td>
</tr>
</tbody>
</table>
26b. You may use a variety of tools and sources **during** your Newfoundland and Labrador trip. From the following list, please indicate how frequently, if at all, you use these tools and sources **during your trip**. Please use a 10-point scale where 1 is ‘do not use at all’ and 10 is ‘use very frequently’.

<table>
<thead>
<tr>
<th>Do Not Use at All</th>
<th>Use Very Frequently</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2 3 4 5 6 7 8 9 10</td>
</tr>
<tr>
<td>GPS technology</td>
<td>☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>Mobile travel applications</td>
<td>☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>newfoundlandlabrador.com – official website of the Department of Tourism, Culture and Recreation</td>
<td>☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>Social networks (e.g. Facebook, Twitter, travel blogs, YouTube)</td>
<td>☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>Newfoundland and Labrador Travellers’ Guide “Lost and Found”</td>
<td>☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>Printed maps (excluding those in the Travel Guide)</td>
<td>☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>Seasonal direct mail brochure “For the Love of NL”</td>
<td>☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>Visitor Information Centres</td>
<td>☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>Event or attraction-specific printed brochures/material</td>
<td>☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>Other sources (please specify)</td>
<td>☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐</td>
</tr>
</tbody>
</table>

27. Please indicate if you **strongly agree**, **somewhat agree**, **somewhat disagree** or **strongly disagree** with the following statement:

With the opening of the Trans Labrador Highway, I am more interested in taking a vacation/pleasure trip in Labrador

01 Strongly agree
02 Somewhat agree
03 Somewhat disagree
04 Strongly disagree

*Voluntary*
98 Don’t know/No answer
99 Refused

**Marketing Materials Awareness**

28. So far during 2010, do you recall seeing, reading or hearing any tourism advertisements or promotions related to vacationing in Newfoundland and Labrador?

01 Yes  **Continue**
02 No  **Go to Q31**
29. Thinking of the advertisement or promotion you saw, read or heard what was the MAIN message of the advertisement or promotion?

**RECORD RESPONSE**

30. Did the advertisement or promotion...... **READ AND ROTATE LIST**

- 01 Make you want to vacation in Newfoundland and Labrador
- 02 Have no influence on your decision to take future vacations in Newfoundland and Labrador
- 03 Make you not want to vacation in Newfoundland and Labrador

**Demographics**

And lastly, just a few questions to help us analyze the information you have provided. Please note, these answers are confidential and will be combined with the answers from other respondents. No individual results will be released.

31. Which of the following best describes the highest level of education you have completed? **READ LIST**

- 01 High school or less
- 02 Community/technical college/vocational training (some or graduated)
- 03 College/university/other post secondary (some or graduated)
- 04 Post graduate (e.g. masters degree, doctorate)

**Voluntary**
98 Don’t know/No answer
99 Refused

32. Which of the following broad income categories best describes your total annual household income (that is, everyone combined, before taxes)? **READ LIST**

- 01 Less than $40,000
- 02 $40,000 to $69,999
- 03 $70,000 to $99,999
- 04 $100,000 to $149,999
- 05 $150,000 or more

**Voluntary**
98 Don’t know/No answer
99 Refused

33. Including yourself, how many people currently live in your household?

____________ NUMBER OF PEOPLE
34. What are the first three digits of your postal code? **RECORD RESPONSE**

**Voluntary**
98 Don’t know
99 Refused

35a. From time to time, the Department of Tourism, Culture and Recreation conducts follow-up research to understand specific issues and traveller requirements. Would you be willing to participate in additional research?

01 Yes **Continue**
02 No **Go to END**

35b. Through which of the following methods may we contact you? **READ LIST, SELECT ALL THAT APPLY**

01 Telephone
02 Mail (postal)
03 E-mail/Internet

35c. Please provide your contact information.

**COLLECT FIRST NAME, LAST NAME FOR ALL**

*IF Q35b=01: COLLECT TELEPHONE NUMBER (XXX-XXX-XXXX)*
*IF Q35b=02: COLLECT STREET ADDRESS/PO BOX/ROUTE#, COMMUNITY, AND POSTAL CODE*
*IF Q35b=03: COLLECT EMAIL ADDRESS*

That is all the questions I have for you today.
Thank you very much for your time.