



Non-Resident Visitor Follow-up Survey

**Leisure Visitors to Newfoundland and Labrador:
Vacation Attitudes, Perceptions and Experiences**

FINAL REPORT

**An Element of the
2003-2004 Exit Survey Program**

Table of Contents

| | |
|---|-----------|
| 1.0 INTRODUCTION | 1 |
| 1.1 BACKGROUND | 1 |
| 1.2 REPRESENTATIVENESS OF COMPLETED SAMPLE | 2 |
| 1.3 REPORT STRUCTURE AND REPORTING APPROACH | 3 |
| 1.4 DEFINITIONS AND ABBREVIATIONS | 4 |
| 1.4.1 Regions: | 4 |
| 1.4.2 Other Definitions: | 4 |
| 1.4.3 Abbreviations | 4 |
| 2.0 VACATION DESTINATION ATTITUDES AND DECISION-MAKING | 5 |
| 2.1. DESTINATION FEATURES SOUGHT | 5 |
| 2.1.1 Regional Differences | 6 |
| 2.1.2 Ontarians | 7 |
| 2.2 NEWFOUNDLAND AND LABRADOR TRIP MOTIVATORS | 8 |
| 2.2.1 Regional Differences | 9 |
| 3.0 TRIP DECISION-MAKING | 11 |
| 3.1 INFORMATION DESIRED PRIOR TO MAKING DECISION TO VISIT | 11 |
| 3.2 THE PLANNING CYCLE | 11 |
| 4.0 VISITOR PERCEPTIONS OF NEWFOUNDLAND AND LABRADOR | 13 |
| 4.1 PRE-VISIT PERCEPTIONS OF NL VERSUS POST-VISIT DESCRIPTIONS OF NL | 13 |
| 4.2 SPECIFIC ADVERTISING RECALL | 14 |
| 4.3 COMPARISON OF NEWFOUNDLAND AND LABRADOR VACATION TO MARITIME'S VACATION | 18 |
| 4.3.1 Regional Differences | 19 |
| 5.0 THE VISIT EXPERIENCE | 20 |
| 5.1 LIKELIHOOD OF REPEAT VISITS | 20 |
| 5.2 LEVEL OF SATISFACTION | 21 |
| 5.3 MEETING EXPECTATIONS | 22 |
| 5.4 HIGHLIGHTS OF TRIP | 23 |
| 5.5 ASPECTS LEAST IMPRESSED WITH | 24 |
| 5.6 AREAS FOR IMPROVEMENT | 25 |
| 5.6.1 By Main Purpose | 26 |
| 5.6.2 By Market | 26 |
| 5.7 REACTION TO SPECIFIC DIMENSIONS OF THE VACATION EXPERIENCE | 27 |
| 5.8 COMPARISON TO OTHER VACATION DESTINATIONS | 31 |
| 5.8.1 Ratings by Trip Reason | 31 |
| 5.8.2 Ratings by Market | 32 |
| 5.8.3 First Time Visitors by Main Purpose | 32 |
| 5.8.4 First Time Visitors by Market | 32 |
| 6.0 INTERNET AND PACKAGES: USAGE AND INTEREST | 33 |
| 6.1 INTEREST IN PACKAGES | 33 |
| 6.2 TYPES OF PACKAGES OF INTEREST | 33 |
| 6.2.1 By Main Trip Reason | 34 |
| 6.2.2 By Market | 34 |
| 6.3 WEBSITE VISITS | 35 |
| 6.3.1 Frequency | 35 |
| 6.3.2 Information Sought (Q39 & Q40) | 37 |
| 6.3.3 Interest in Internet Newsletter/Promotional E-mails | 37 |

| | |
|---|-----------|
| 7.0 CONCLUSIONS AND IMPLICATIONS | 39 |
| 7.1 DESTINATION FEATURES SOUGHT & MOTIVATORS TO VISIT | 39 |
| 7.1.1 Conclusions..... | 39 |
| 7.1.2 Implications | 39 |
| 7.2 TRIP DECISION-MAKING..... | 40 |
| 7.2.1 Conclusions..... | 40 |
| 7.2.2 Implications | 40 |
| 7.3 VISITORS PERCEPTIONS | 40 |
| 7.3.1 Conclusions..... | 40 |
| 7.3.2 Implications..... | 41 |
| 7.4 THE VISIT EXPERIENCE | 41 |
| 7.4.1 Conclusions..... | 41 |
| 7.4.2 Implications | 41 |
| 7.5 HIGHLIGHTS OF THE VACATION TRIP..... | 41 |
| 7.5.1 Conclusions..... | 41 |
| 7.5.2 Implications | 42 |
| 7.6 AREAS FOR IMPROVEMENT | 42 |
| 7.6.1 Conclusion | 42 |
| 7.6.2 Implications | 42 |
| 7.7 ATTITUDES TOWARD DIMENSIONS OF THE VACATION EXPERIENCE | 42 |
| 7.7.1 Conclusions..... | 42 |
| 7.7.2 Implications | 42 |
| 7.8 COMPETITIVE ADVANTAGES..... | 42 |
| 7.8.1 Conclusions..... | 42 |
| 7.8.2 Implications | 43 |
| 7.9 INTEREST IN PACKAGES | 43 |
| 7.9.1 Conclusions..... | 43 |
| 7.9.2 Implications | 43 |
| 7.10 WEBSITE..... | 43 |
| 7.10.1 Conclusions..... | 43 |
| 7.10.2 Implications..... | 44 |
| APPENDIX A: FINAL QUESTIONNAIRE | 45 |
| SECTION A. DECISION MAKING | 48 |
| SECTION B. PLANNING | 50 |
| SECTION C: PRIOR PERCEPTIONS AND EXPECTATIONS..... | 50 |
| SECTION D: ACTUAL VISIT EXPERIENCE..... | 51 |
| SECTION F. ACTIVITIES/SITES VISITED | 53 |
| SECTION G: PRODUCT DEVELOPMENT SECTION..... | 56 |
| SECTION H. MEDIA | 62 |
| APPENDIX B: | 64 |
| COMPARISON OF SURVEY POPULATION AND COMPLETED SAMPLE | 64 |
| APPENDIX C: INFORMATION DESIRED PRIOR TO VISIT..... | 66 |
| APPENDIX D: IMAGE AND DESCRIPTION COMMENTS BY CATEGORY | 71 |
| APPENDIX E: | 78 |
| COMMENTS ON THE COMPARISON WITH THE MARITIMES..... | 78 |
| APPENDIX F: TRIP HIGHLIGHTS..... | 82 |
| APPENDIX G: ASPECTS LEAST IMPRESSED WITH..... | 84 |
| APPENDIX H: AREAS FOR IMPROVEMENT | 91 |
| APPENDIX I: PERCEIVED CULTURAL DIFFERENCES..... | 98 |

| | |
|--|------------|
| APPENDIX J: INFORMATION SOUGHT ON WEBSITE | 104 |
| APPENDIX K: INFORMATION UNAVAILABLE ON WEBSITE..... | 108 |

1.0 Introduction

1.1 Background

In an effort to better understand the attitudes and perceptions of non-resident visitors, the Department of Tourism, Culture and Recreation undertook a follow-up survey to the exit surveys conducted during the peak tourism season of June to September 2003. The following report presents the results of the 2003 non-resident visitor follow-up survey. The available population for this survey was all those non-resident visitors interviewed as part of the exit survey program who were willing to participate in further research. For purposes of this summary, this group is referred to as the “Willing Population”.

The primary objectives of this survey were:

- to obtain information on visitors’ perceptions and attitudes on elements of interest to the Marketing Division to assist in the on-going evolution of marketing programs and in particular consumer marketing programs; and
- to obtain information from non-resident visitors to assist in the development of a product development strategy.

Given the sensitivity to individual’s privacy and willingness to provide contact information, those interested in participating in further research were asked to indicate their preferred method(s) of contact for a follow-up survey. Thus, three methods were used to collect the data, including: a telephone survey, an on-line survey with email invitation and a mail-back survey. Data collection was conducted during the period February 15th to April 19th, 2004.

A total of 1978 non-resident visitors surveyed during the exit survey (air and auto components) from the period June 22 to September 30, 2003 were willing to participate in the follow-up survey. The response rate was high. A total of 1063 surveys were completed, including 31 mail-back surveys received past the cut-off period and 17 respondents participating in the pre-test of the survey. This represents an overall response rate of 54%. Responses rates, while slightly higher for those contacted by telephone (59%), were 47% for both the on-line and mail back methods of data collection. Analyses have been based on a total of 1015 completed surveys.

A copy of the final questionnaire is provided in Appendix A. It should be noted that minor wording adjustments were made to accommodate the method of interview.

Initial tabular results were provided to the Department in March based on the completed telephone and on-line portion of the data collection to assist in the development of the product development strategy. This report presents the vacation attitudes, perceptions and experiences of non-resident leisure visitors to Newfoundland and Labrador. For purposes of this report, leisure visitors includes those individuals who indicated that their main reason for visiting Newfoundland and Labrador was *either* for vacation/pleasure purposes *or* to visit friends and/or relatives. The decision to report

results in this document on leisure visitors was based on two factors – 1) the number of business visitors in the completed sample was small and 2) the Department desired a primary focus in this research to be obtaining information to assist in the planning of consumer marketing initiatives.

1.2 Representativeness of Completed Sample

The completed sample is generally representative of the population of those who were willing to participate in further research. This assessment was based on a comparison of the distribution of both the total population of those willing to participate in further research and the completed sample. (See Tables 1, 2, 3 and 4 below). Further analysis was done to assess the representativeness of the completed sample based on a profile of the total population on several key demographic variables including age, income level and education. These tables are presented in Appendix B.

Table 1: Comparison of Distribution by Origin

| Origin | Total Population Willing | | Total Completed Sample | |
|-----------------------|--------------------------|---------------|------------------------|-------------|
| | N | % | N | % |
| Maritimes | 453 | 22.9% | 224 | 22.1% |
| Quebec | 75 | 3.8% | 26 | 2.6% |
| Ontario | 745 | 37.7% | 413 | 40.8% |
| Prairies and Northern | 133 | 6.7% | 60 | 5.9% |
| B.C. | 79 | 4.0% | 40 | 3.9% |
| US States | 398 | 20.1% | 218 | 21.5% |
| International | 95 | 4.8% | 33 | 3.3% |
| Total | 1978 | 100.0% | 1015 | 100% |

Table 2: Comparison of Distribution by Contact Method

| Preferred Method of Contact | Total Population Willing | | Total Completed Sample | |
|-----------------------------|--------------------------|---------------|------------------------|---------------|
| | N | % | n | % |
| Telephone | 718 | 36.3% | 426 | 42.8% |
| E-Mail | 763 | 38.6% | 358 | 35.3% |
| Mail | 497 | 25.1% | 241 | 23.7% |
| Totals | 1978 | 100.0% | 1015 | 100.0% |

Table 3: Comparison of Distribution by Mode of Travel

| Mode | Total Population Willing | | Total Completed Sample | |
|---------------|--------------------------|---------------|------------------------|---------------|
| | N | % | n | % |
| Air | 611 | 30.9% | 242 | 23.8% |
| Auto | 1367 | 69.1% | 773 | 76.2% |
| Totals | 1978 | 100.0% | 1015 | 100.0% |

Table 4: Comparison of Distribution by Trip Purpose

| | | Total Population Willing | | Total Completed Sample | |
|---------------------|--|--------------------------|--------|------------------------|--------|
| | | N | % | n | % |
| TRIP PURPOSE | 1 Convention/Conference/Incentive Travel | 29 | 1.5% | 13 | 1.3% |
| | 2 Business/meeting(s) with associates/clients or other business | 164 | 8.3% | 53 | 5.2% |
| | 3 Vacation or Pleasure | 1292 | 65.3% | 709 | 69.9% |
| | 4 Visiting Friends/Relatives | 493 | 24.9% | 240 | 23.6% |
| Total | | 1978 | 100.0% | 1015 | 100.0% |

1.3 Report Structure and Reporting Approach

The focus of this report is on the leisure visitor. This includes those whose main reason for travel was for vacation or pleasure or to visit family and/or relatives. Many questions were asked of the vacation/pleasure traveler only and therefore the reader is cautioned to be aware of the various groups being reported in tables and figures. The groups being reported will be identified in tables and graphs as appropriate. Given the small completed-sample of other International (non-American) visitors, results for this particular subgroup have been excluded from reporting in this report. Similarly, given the focus of this report, results for business visitors are also excluded.

As part of the data analysis, the following base sizes of groups are worth noting. The estimated margin of error for the total sample is +/- 3.7%, 19 times out of 20; however the margin of error increases for results based on the smaller subgroups.

Table 5: Sample Sizes of Reported Subgroups

| Subgroups | n |
|--------------------------------------|-----|
| All Leisure Visitors | 949 |
| First Time Leisure Visitors | 482 |
| Main Purpose Groups: | |
| Vacation/Pleasure Visitors | 709 |
| Visiting Friends/Relatives | 240 |
| Regional Groups | |
| Maritime Leisure Visitors | 197 |
| Ontario Leisure Visitors | 396 |
| Other Canadian Leisure Visitors | 117 |
| USA Leisure Visitors | 209 |
| Other International Leisure Visitors | 30 |

Table 6: Sample Sizes of Leisure Visitors by Main Purpose by Region

| | Region | | | | | | | | | | | |
|-----------------------------------|------------|-------------|------------|-------------|------------|-------------|--------------|-------------|------------|-------------|-----------|-------------|
| | Total | | Maritimes | | Ontario | | Other Canada | | USA | | Other | |
| | n | % | n | % | n | % | n | % | n | % | n | % |
| Total (n) | 949 | 100% | 197 | 100% | 396 | 100% | 117 | 100% | 209 | 100% | 30 | 100% |
| Vacation/Pleasure Visitors | 709 | 75% | 110 | 56% | 301 | 76% | 87 | 74% | 189 | 90% | 22 | 73% |
| Visiting Friends/Relatives | 240 | 25% | 87 | 44% | 95 | 24% | 30 | 26% | 20 | 10% | 8 | 27% |

1.4 Definitions and Abbreviations

Throughout this report references are made to specific groups. These groups have been defined as follows:

1.4.1 Regions

| | |
|----------------------|---|
| Maritimes: | Nova Scotia, New Brunswick and Prince Edward Island |
| Ontario: | Province of Ontario |
| Other Canada: | Quebec, Manitoba, Saskatchewan, Alberta, British Columbia, Yukon, North West Territories – Iqualuit |
| USA: | All US states and territories |
| Other International: | All other international countries |

1.4.2 Other Definitions

Top Box and Top 3 Box

Rating questions are reported using two methods – ***Top Box*** and ***Top 3 Box*** percentages and mean ratings. A ***Top Box*** score is the percentage of respondents in a given group that gave the highest rating of 10 on the relevant scale – agreement/satisfaction etc. The ***Top 3 Box*** score is the percentage of respondents in a given group that gave a rating of 8, 9, or 10. Therefore the two groups are not mutually exclusive as those who gave a rating of 10 are included in the ***Top 3 Box*** number. Thus, the two percentages cannot be added together. The purpose of using ***Top 3 Box*** scores is to identify the level of agreement or satisfaction among respondents to determine ranking of items; however, often when ratings are high, the ***Top 3 Box*** masks differences among respondents. Therefore, where relevant, we have reported the ***Top Box*** percentages separately from the ***Top 3 Box percentages***.

Leisure Visitor

A Leisure Visitor includes those individuals who indicated the main reason for their trip to Newfoundland and Labrador was for vacation/pleasure, or to visit friends and relatives. This latter group is often referred to as VFRs through this report.

1.4.3 Abbreviations

Abbreviations are most frequently used in figures throughout this report. Those used, include:

| | |
|------------|------------------------------------|
| VFR | Visiting Friends/Relatives Visitor |
| V/P | Vacation/Pleasure Visitor |
| NL | Newfoundland and Labrador |

2.0 Vacation Destination Attitudes and Decision-Making

Given the focus on understanding the consumer market, many of the survey questions were asked only of those individuals who indicated that the main reason for their trip was vacation or pleasure or to visit friends and relatives. In some cases, questions were only asked of vacation/pleasure visitors or first time visitors. For all survey questions reported in this section, ONLY Vacation/Pleasure visitors were asked to respond.

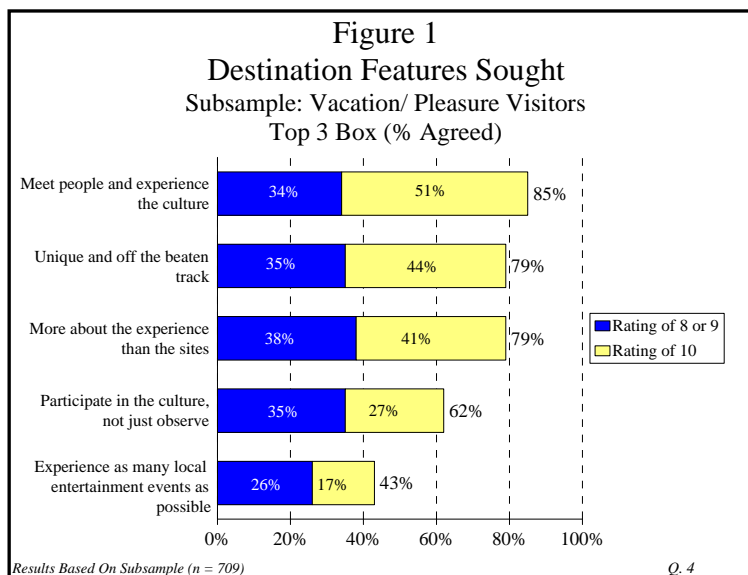
2.1. Destination Features Sought (Q4a- 4e) (Vacation/Pleasure visitors only)

As a means to explore specific dimensions of vacation attitudes that could be used in the development of marketing campaigns, respondents were asked to rate their level of agreement with five different aspects of a vacation experience or destination. These aspects were chosen to determine to what degree they may be selling points for the Newfoundland and Labrador destination:

- Desire to visit a unique and off-the-beaten track destination
- Desire to meet the people and experience the culture
- Experience contributes more to the vacation than the sites
- Desire to attend many local entertainment events
- Desire to participate in the culture of a destination rather than observe it

The majority of respondents agreed with each of the above dimensions, providing ratings of 8, 9 or 10 (referred to in this report as Top 3 Box), with some regional

differences noted among those scoring an aspect 10 on the agreement scale (referred to in this report as Top Box). As seen in the accompanying graph, for the most part, *meeting the people and experiencing the culture* captured the highest level of agreement among vacation/pleasure visitors, with 51% giving this aspect a rating of 10. This dimension was followed by the *desire to visit unique and off-the-beaten track*



destinations, with 44% giving the Top Box Score followed by *the experience, being more important than the sites* with 41% rating this 10. Participating in culture, versus observing culture was of interest to 62% of vacation/pleasure travelers (Top 3 Box), but it was not as strongly rated as other dimensions with only 27% rating it 10. Likewise, the desire to attend many local entertainment events garnered a Top Box Score of 10 by 17% of vacation/pleasure visitors and a Top 3 Box score of 43%.

It is interesting to note that those Vacation/Pleasure visitors who were “extremely” satisfied with their vacation in Newfoundland and Labrador (i.e. giving a rating of 10 on the satisfaction scale) agreed with the above statements to a greater extent than did those less satisfied.

Table 7: Destination Features Sought - Mean Values by Degree of Satisfaction Vacation/Pleasure Visitors

| | | | Extremely Satisfied | Very Satisfied | Less Satisfied |
|---|--------------|-----|---------------------|----------------|----------------|
| | Total | 708 | 384 | 276 | 47 |
| Unique and off the beaten track | Mean | 8.5 | 8.7 | 8.3 | 7.7 |
| | N | 707 | 383 | 276 | 47 |
| Meet people and experience the culture | Mean | 8.9 | 9.2 | 8.6 | 7.9 |
| | N | 707 | 383 | 276 | 47 |
| More about the experience than the sites | Mean | 8.6 | 8.9 | 8.2 | 7.6 |
| | N | 706 | 384 | 274 | 47 |
| Experience as many local entertainment events as possible | Mean | 6.8 | 7.1 | 6.5 | 6.3 |
| | N | 705 | 383 | 274 | 47 |
| Participate in the culture, not just observe | Mean | 7.8 | 8.2 | 7.5 | 6.7 |

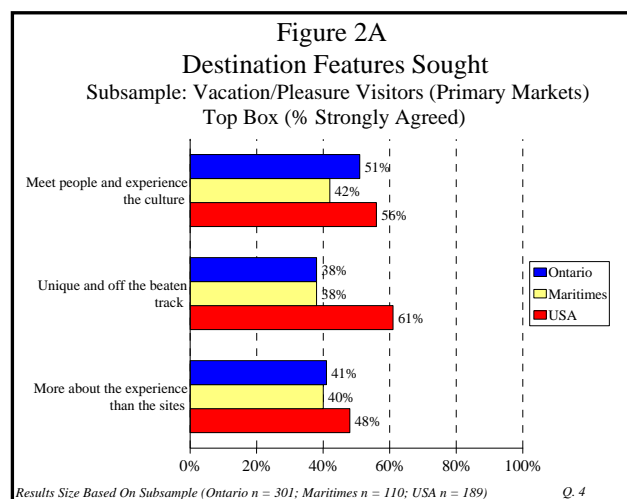
2.1.1 Regional Differences

Recognizing that the top three and bottom two dimensions were the same across the regions, a number of differences were noted in the intensity of the level of agreement.

Maritimers

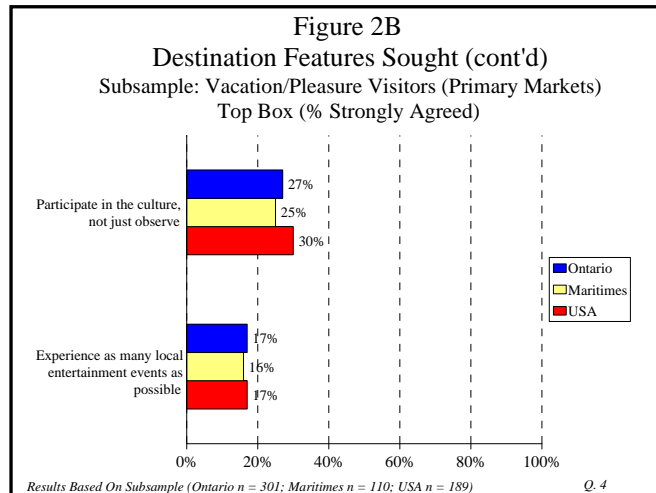
Within the Maritimes there was little difference expressed in agreement levels across the highest rated three dimensions with the top box scores ranging from 38% for unique and off-the-beaten-track destinations to 42% for meeting people and experiencing the culture and 40% relating to wanting the experience over the sites. In relation to other markets, they were:

- Less likely than Americans to agree with the desire to seek out unique and off-the-beaten track destinations; but similar to other markets;
- Less likely than Canadians outside the Maritimes and Americans to agree that they want to meet people and experience the culture
- Slightly more likely to seek the experience more than the site compared to other Canadians outside of Ontario



2.1.2 Ontarians

Ontarians were similar to other Canadians (excluding Maritimers) in relation to their desire to meet the people and experience the culture of places they visit with a Top Box Score of 51%. This indicated a slightly higher desire for this as part of a vacation compared to Maritimers. Yet Ontarians were similar to Maritimers in their desire to have an experience rather than just seeing sites (Top Box scores of 41% and 40% for Maritimers and Ontarians respectively).



Americans

American visitors gave the highest average ratings of any vacation/pleasure market on the three statements:

- Wanting unique and off-the-beaten track vacation destinations;
- Desire to meet the people and experience the culture; and
- More interested in the experience than just the sites.

On the remaining dimensions – *taking in many local entertainment events* and *having a desire to participate in the culture*, American vacation/pleasure visitors provided lower agreement ratings than Canadian visitors.

Other Canadians (Excluding Main Markets of Maritimes and Ontario)

Relative to other respondents, residents of other Canadian provinces and territories were:

- less likely to want the experience over the sites;
- less likely to want to take in as many local entertainment events than other Canadians; and
- as likely to want to participate in the culture as other Canadians and Americans were.

Other International Visitors

The sample of International visitors was quite small and therefore subject to great fluctuations; however observationally this group tended to consistently score each of the dimensions the lowest of any vacation/pleasure visitors.

Looking at each dimension, it appears that Americans are more likely to seek out destinations that *are unique and off-the-beaten track* with 61% of US respondents rating this a 10. For respondents from other regions, this percentage hovered around 40% giving the 10 rating.

2.2 Newfoundland and Labrador Trip Motivators

In an effort to isolate primary trip motivators to visit Newfoundland and Labrador, a series of statements were read to respondents to gather their feedback. The statements included:

- “I wanted to explore the landscape”
- “I’ve heard so much about the place, I wanted to experience it myself”
- “The history of the people and place intrigued me”
- “I wanted to see icebergs and/or whales”
- “I wanted to experience a new or different history and culture”
- “Newfoundland and Labrador is the only province in Canada that I haven’t visited”
- “I came to participate in a specific activity”

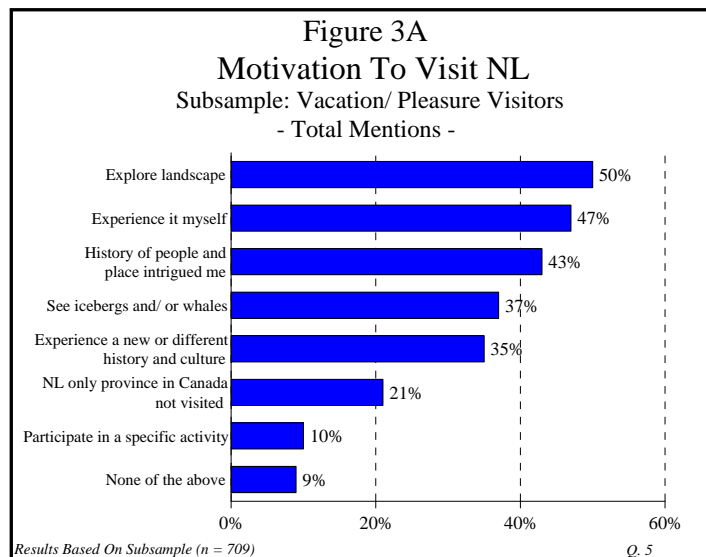
If none of the above statements adequately described a respondent’s prime motivation for visiting the Province, they were prompted to give their own response. Only 9% (n=65) of vacation/pleasure visitors cited motivations other than those given above. The majority of the **other** motivators mentioned related to visiting family/friends and returning home to their native province. Additional motivators mentioned, NOT related to family or provincial ties included:

- “to bring relatives/friends to see the Province”
- “to explore the island”
- “enjoyed last trip here”
- “previously worked here/wanted a return visit”
- “have property/vacation home in Province”
- “wanted to see things missed during last visit”

It should be noted; however, that none of these **other** motivators was mentioned by more than 10 visitors.

Generally there was more than one statement that respondents chose to describe their motivation for visiting, indicating that the trip decision is a complex one, influenced by many factors.

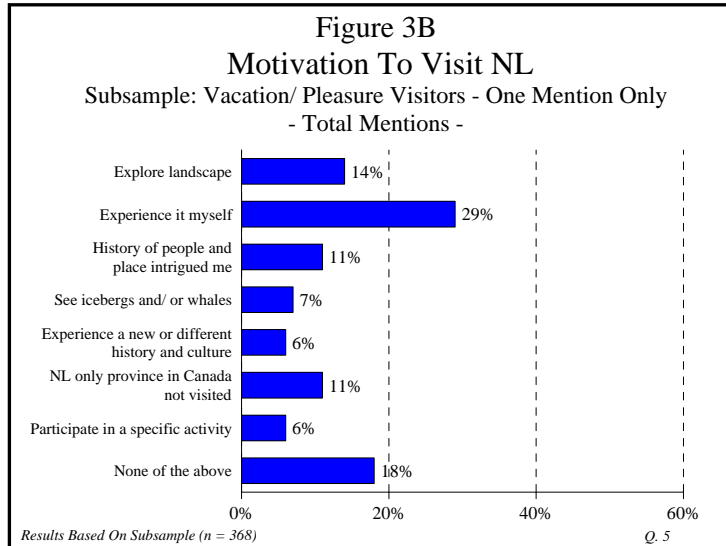
Overall, *exploration of the landscape* received the top mentions at 50%. *Having heard so much about the place and wanting to experience it* was a close second with 47%, and “*the*



intrigue of the history of the people and place” followed, with 43%. The desire to *see icebergs and whales* and to *experience a new or different history or culture* represented 37% and 35% of total mentions respectively. Newfoundland and Labrador being the *only*

Canadian province not visited received 21% of all mentions, while half this number, 10%, related to *coming to participate in a specific activity*.

Approximately half (52%) of Vacation/Pleasure visitors indicated one statement as the best descriptor of their motivation to visit the Province. Interestingly, for this group, “*exploring the landscape*” was mentioned by half as many people as “*hearing so much about the place they wanted to experience it themselves*” (14% compared to 29%). Also, 18% of the mentions by this group were motivators other than those provided.

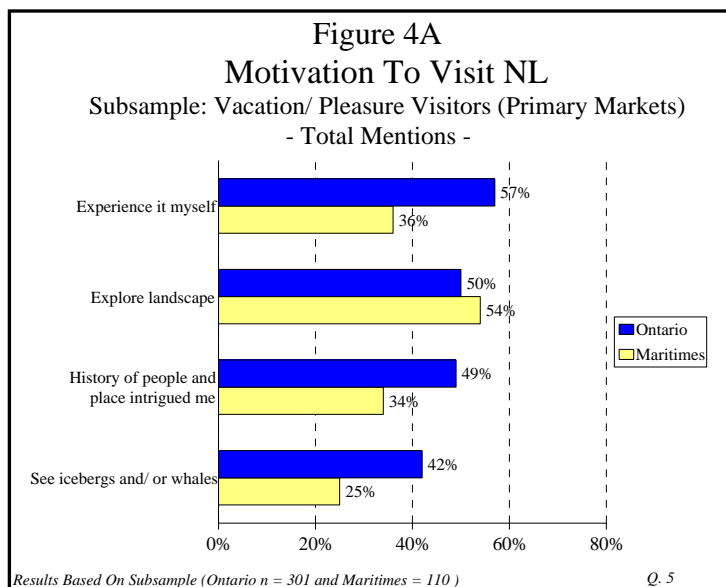


These included:

- to go hiking;
- ties to province (native province, previous work; partner born in province; bring relatives/friends to see province);
- part of another trip (tour package, trip to St. Pierre and Miquelon);
- to see things missed during last visit;
- never been to province before; and
- enjoyed last trip.

2.2.1 Regional Differences

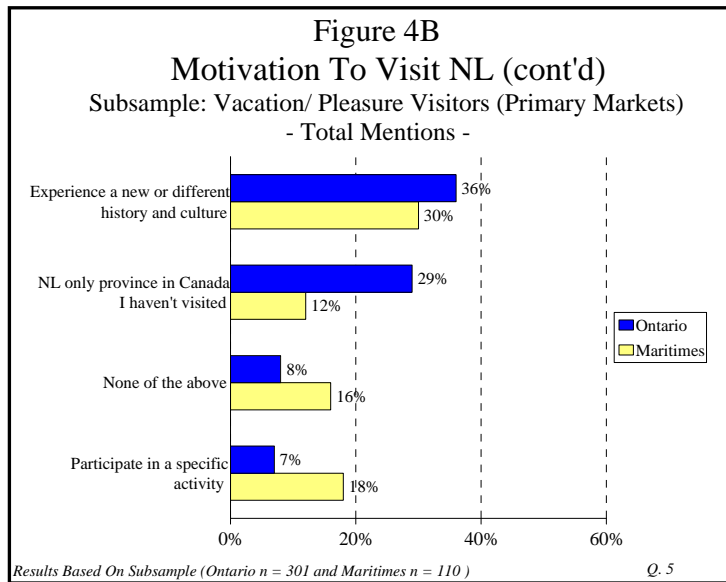
There were differences in motivations by region. The top mentions by region indicate that *exploring the landscape* was the more frequently mentioned statement by Maritime Vacation/Pleasure visitors having 54% of all mentions compared to the next most frequently selected statements “*heard so much about the place*” (36%) and “*intrigued by the history of the people and place*” (34%).



For Ontarians and other Canadians, the top mention was “*having heard so much about the place, I wanted to experience it myself*” - representing 57% and 58% of individuals in Ontario and other Canada respectively.

Among Americans, the top mention was *to explore the landscape and the intrigue of the history of the people and the place* with 47% and 43% of Americans selecting these statements respectively.

Other International visitors most frequently selected the two statements related to scenery – selecting the *desire to explore the landscape* and *wanting to view icebergs and whales*.

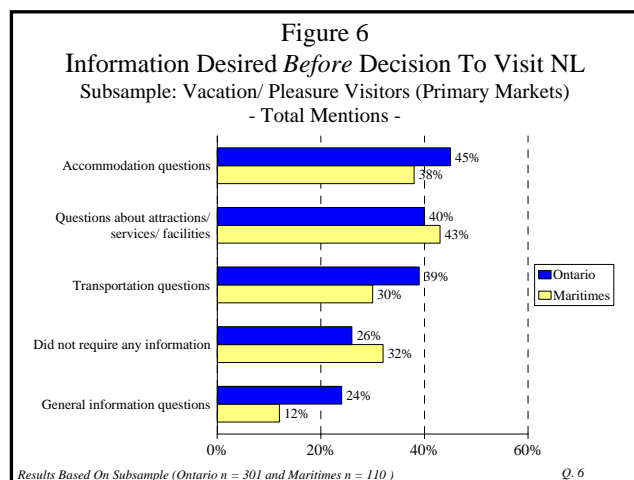
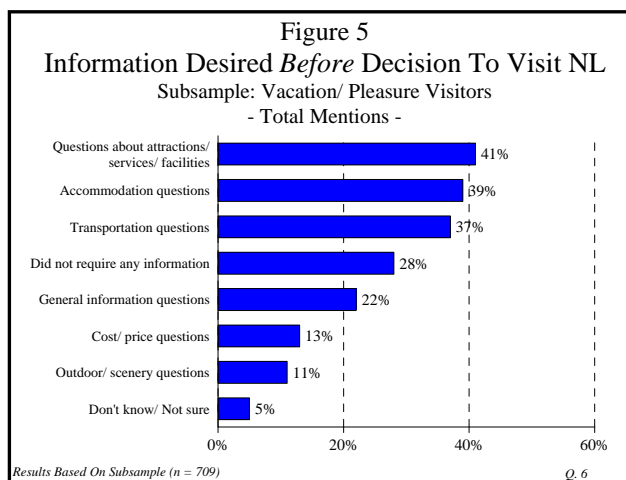


3.0 Trip Decision-Making

3.1 Information Desired Prior to Making Decision to Visit (Q6)

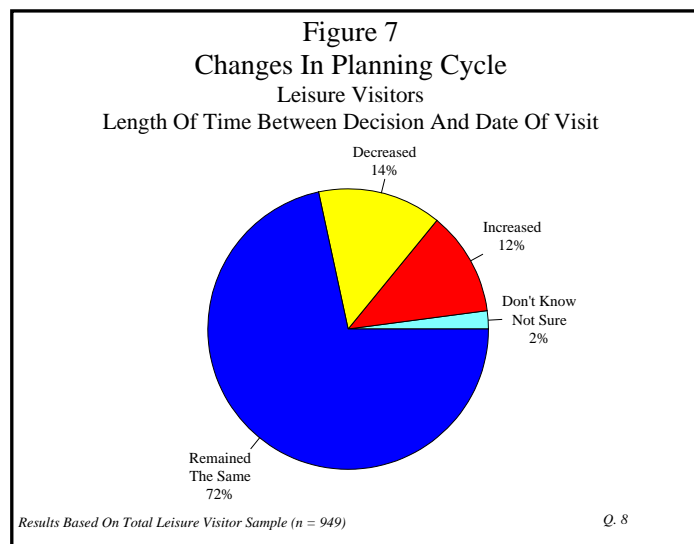
Prior to making their decision to visit Newfoundland and Labrador it is not surprising that Vacation/Pleasure visitors most frequently mentioned having questions about attractions/services/facilities; accommodations and transportation, representing 41%, 39% and 37% of all mentions respectively. Almost three in ten visitors indicated that they did not need any information prior to deciding to visit the Province.

The top mention by Ontarians related to accommodations with 45% of Vacation/Pleasure visitors from this region wanting this information. The top mention for those in the Maritimes (43%) and other provinces of Canada (53%) (excluding the Maritimes and Ontario) were questions related to attractions/services and facilities. A more detailed listing of specific items mentioned is provided in Appendix C.



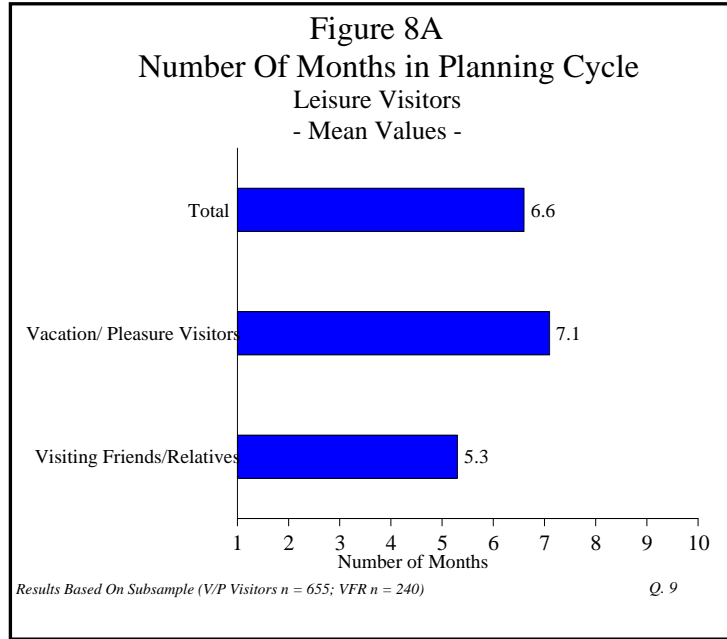
3.2 The Planning Cycle (Q8, Q9)

The duration of the planning cycle basically remained unchanged for the vast majority of leisure visitors (72%) indicating that the decision to visit is made about the same time in advance of the actual visit as has been the case historically. Based on anecdotal information obtained from operators regarding the 2003 tourist season, it appeared that actual bookings were made later. From the Department's perspective the timing of being in the



marketplace with destination marketing should remain the same as it has been.

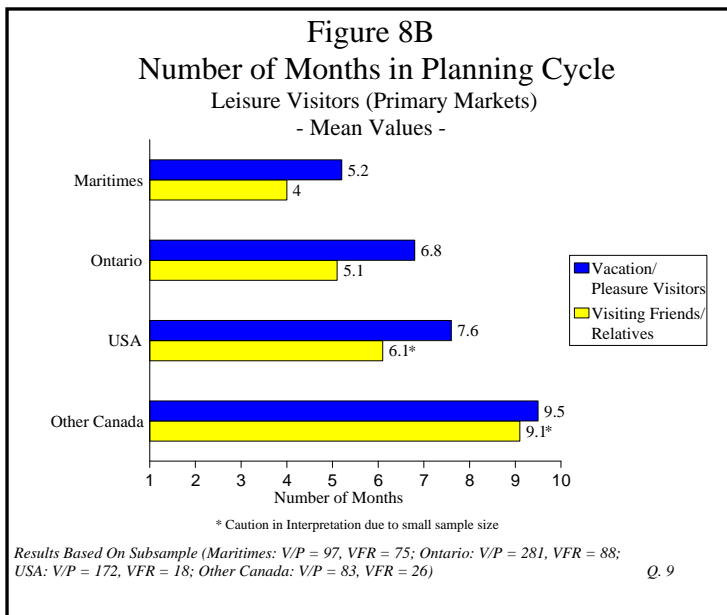
The actual decision to visit is made by leisure visitors, on average, about six and a half months prior to the date of visit. Not surprising, VFR visitors report a shorter planning cycle, yet, nonetheless, decided, on average, 5.3 months prior to their visit, compared to Vacation/ Pleasure visitors who planned, on average, 7.1 months in advance.



Given that the majority of non-resident visitation to the province occurs during the months of July and August, travelers during these months were isolated to determine whether the length of the planning cycle was impacted.

Just over 80% of visitors surveyed, traveled during the months of July and August. For leisure visitors traveling in peak season, the average planning cycle remained unchanged at 7.1 months. Given that most leisure travel to Newfoundland & Labrador occurs in July and August, marketing programs should therefore be in place by January.

It should be noted, however, that there were differences in the timing of the cycle based on market. Visitors from the Maritimes decide later than those from other parts of Canada. This is likely a function of the distance required to travel and the nature of Maritimes market, having a higher percentage of VFR visitors to the Province compared to other markets. The average length of time between the decision to come and the actual visit increases for Americans and Canadians living outside the Maritimes and Ontario.



Generally, the planning cycle tends to increase slightly the greater the distance to be traveled and if the trip purpose is strictly for Vacation/Pleasure.

4.0 Visitor Perceptions of Newfoundland and Labrador

4.1 Pre-Visit Perceptions of NL versus Post-Visit Descriptions of NL (Q10)

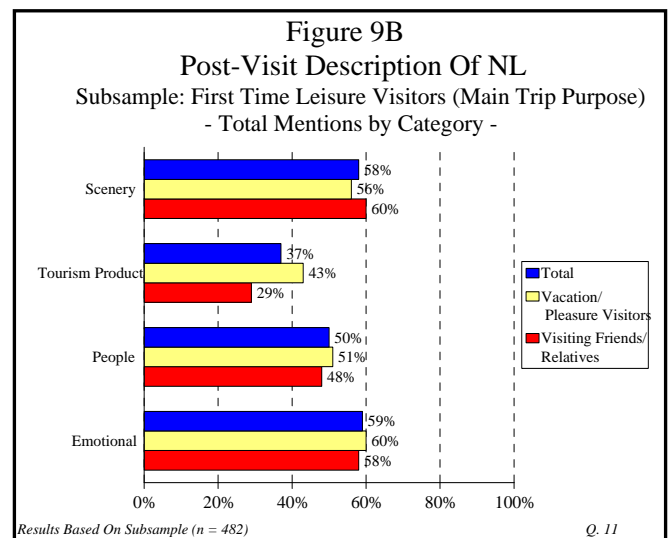
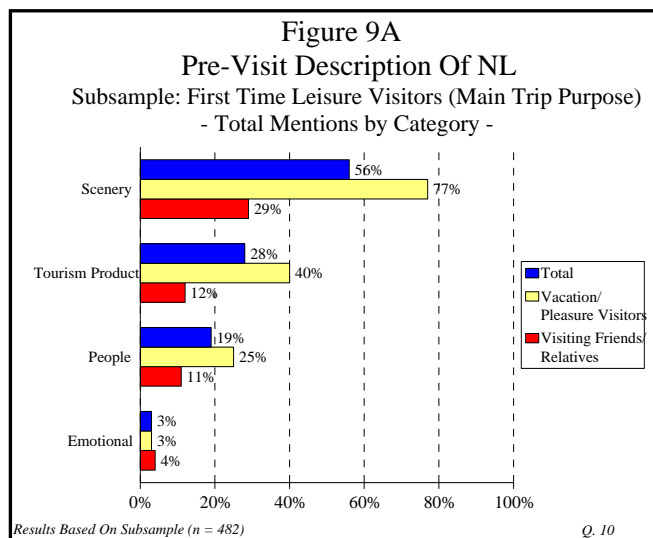
In order to understand what perceptions visitors to the Province had prior to arriving, **first time leisure visitors** were asked what images they had of Newfoundland and Labrador **prior** to their visit. These same individuals were subsequently asked how they would describe the province to a friend or relative, based on what they now know.

Responses were categorized depending upon the nature of the response into one of the following broad areas:

- Scenery-related descriptions
- Tourism product-related descriptions
- People-related descriptions
- Emotional descriptions
- Other descriptions; and
- Negative descriptions.

The most frequently mentioned **pre-visit** image related to the scenery of the Province, followed by mentions of the tourism product. Approximately one-third of first time leisure visitors did not provide an image. The majority of these were VFR visitors. These individuals stated that they knew what to expect and had previous knowledge of the province.

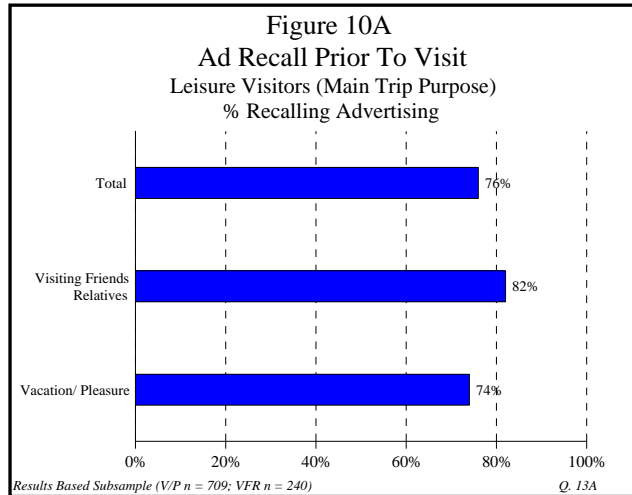
Interestingly, the percentage of emotional and people-related descriptions mentioned increased once individuals had visited, receiving as many mentions as the scenery. Scenery mentions maintained their level high overall, but it did drop somewhat as a descriptor for Vacation/Pleasure visitors post-visit. This would suggest that we are delivering an equally emotional and engaging experience with visitors as we are a scenic physical product.



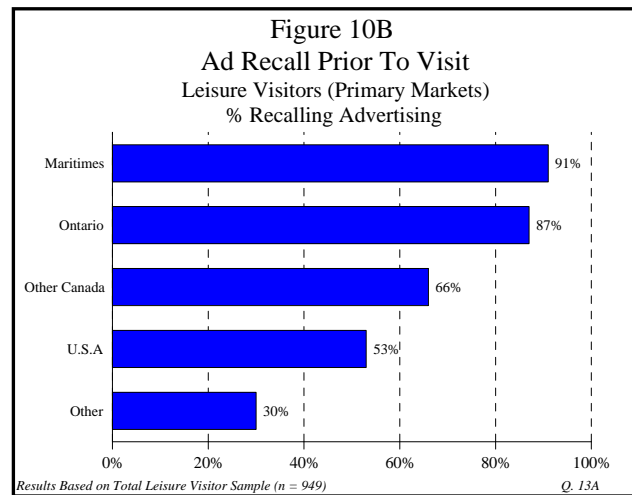
Examples of the type of comments made in each category can be found in Appendix D.

4.2 Specific Advertising Recall (Q13 a – b)

All leisure visitors were asked whether they were able to recall seeing, hearing or reading advertising for Newfoundland and Labrador prior to their visit. Over three-quarters (76%) of leisure visitors indicated they had. Recall by VFR visitors was higher than the recall of the vacation/pleasure visitor, yet both levels of advertising recall were quite high – 82% of VFR and 74% of Vacation/Pleasure visitors.



Recall of advertising across the various markets was significantly different. Recall was highest among Maritimers and Ontarians hovering around 90%. Recall by visitors from other areas was relatively lower, but still high at 66% of those from other Canadian provinces and 53% of Americans. There were no significant differences in ad recall between Vacation/Pleasure Visitors and Visiting Friends/Relatives Visitors within each market.



When asked, most leisure visitors recalled specific images. Given the focus of the 2003 advertising program in the Maritimes and Ontario, it is not surprising that the recall of specific images was highest among visitors in these markets at 72% and 70% respectively. Visitors from other Canadian provinces mentioned specific images 34% of the time; while mentions of these images represented only 10 to 18% of the aspects recalled by Americans and visitors from other countries. A sample listing of images mentioned follows.

Table 8: Images Recalled from Advertising - Leisure Visitors- % Total Mentions

| | Total | Main Purpose | |
|--|-------|--------------|-----|
| | | V/P | VFR |
| Total (N) | 723 | 527 | 196 |
| Scenes of Gros Morne | 9.1 | 9.3 | 8.7 |
| Scenes of Newfoundland and Labrador | 4.7 | 4.6 | 5.1 |
| Whales | 6.8 | 6.1 | 8.7 |
| Cape Spear | 1.2 | 0.9 | 2.0 |
| Golf courses/ golfing | 0.1 | 0.0 | 0.5 |
| Icebergs | 5.0 | 5.1 | 4.6 |
| People kayaking | 0.7 | 0.4 | 1.5 |
| Mountain imagery (people on mountains) | 1.2 | 1.5 | 0.5 |
| Fjord imagery | 0.8 | 1.1 | 0.0 |
| Various sites to visit | 1.0 | 0.6 | 2.0 |
| Various festivals/ events | 0.4 | 0.4 | 0.5 |
| Food (i.e. blueberry pie) | 0.1 | 0.2 | 0.0 |
| Boat/ ferry (i.e Marine Atlantic) | 0.1 | 0.2 | 0.0 |
| L' Anse Aux Meadows | 1.9 | 2.5 | 0.5 |
| Rugged scenery | 0.7 | 0.8 | 0.5 |
| People (i.e. being friendly) | 0.3 | 0.4 | 0.0 |
| Signal Hill | 0.4 | 0.0 | 1.5 |
| Hunting scenes | 0.1 | 0.2 | 0.0 |
| Ocean/ water images | 0.8 | 0.6 | 1.5 |
| Viking images (i.e. villages) | 2.4 | 2.7 | 1.5 |
| Flag of NL | 0.7 | 0.9 | 0.0 |
| Trinity | 0.4 | 0.6 | 0.0 |
| Different activities to take part in | 0.7 | 0.4 | 1.5 |
| People at waterfalls | 0.1 | 0.2 | 0.0 |
| Birds (i.e. Puffins) | 0.6 | 0.8 | 0.0 |
| Caribou | 0.1 | 0.2 | 0.0 |
| Social life images | 0.1 | 0.2 | 0.0 |
| Cultural images | 0.1 | 0.2 | 0.0 |
| St. John's | 1.5 | 1.5 | 1.5 |
| Rocky cliffs | 0.3 | 0.2 | 0.5 |
| Countryside | 0.3 | 0.4 | 0.0 |
| Wildlife | 0.6 | 0.8 | 0.0 |
| Bed and breakfast | 0.3 | 0.2 | 0.5 |
| Fishing | 0.3 | 0.2 | 0.5 |

Table 8: Images Recalled – Leisure Visitors - % Total Mentions (Continued)

| | Total | Main Purpose | |
|--------------------------------|-------|--------------|-----|
| | | V/P | VFR |
| Total (N) | 723 | 527 | 196 |
| Twillingate | 0.1 | 0.2 | 0.0 |
| Targa race | 0.1 | 0.2 | 0.0 |
| Signs (billboards) | 0.1 | 0.2 | 0.0 |
| Canoes | 0.3 | 0.4 | 0.0 |
| Nature images | 0.4 | 0.6 | 0.0 |
| Parks | 0.3 | 0.4 | 0.0 |
| Lighthouses | 0.4 | 0.4 | 0.5 |
| Scenes of people having fun | 0.1 | 0.2 | 0.0 |
| Bonavista | 0.1 | 0.0 | 0.5 |
| Movie sets on location | 0.1 | 0.2 | 0.0 |
| Seal images | 0.1 | 0.2 | 0.0 |
| Landscapes/ coastlines | 0.8 | 0.9 | 0.5 |
| Hiking images | 0.3 | 0.4 | 0.0 |
| Marble Mountain/ skiing images | 0.6 | 0.6 | 0.5 |
| Outports | 0.1 | 0.0 | 0.5 |
| Regatta | 0.1 | 0.0 | 0.5 |
| Terra Nova | 0.1 | 0.2 | 0.0 |

Specific media was named to a similar degree across all regions. Publications and media related responses mentioned included:

- | | |
|--|-----------------------------|
| Newfoundland and Labrador Vacation Guide | Canada Post Moment spot |
| Downhomer | Smithsonian magazine |
| National Geographic/ Canadian Geographic | Bell Express (satellite TV) |
| Chronicle Herald Star | Fifty Plus magazine |
| Good Times | Rolling of the Sea jingle |
| Canadian Living | Reader's Digest |
| NL Tourism Bureau TV spot | Discovery Channel |
| CAA magazine | Global Channel |
| Toronto Star | Halifax Herald |
| CBC TV | Salt Escapes magazine |
| Maclean's | Military magazines |
| Leisure magazine | Newfoundland TV station |
| Tracks To Adventure (brochure) | East Coast Music Awards |
| Random Passage TV movie | Ottawa Citizen |
| Gordon Pinsent program | Globe and Mail |

A list of other items recalled follows.

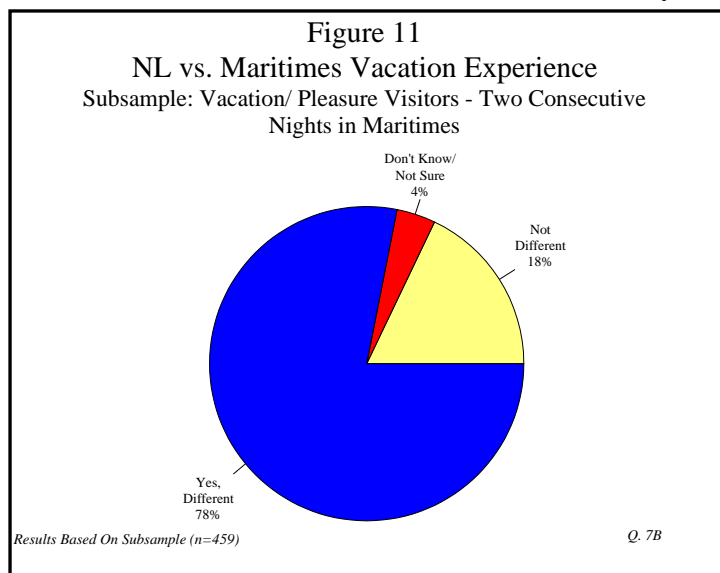
Table 9: Other Elements Recalled: Leisure Visitors - % Total Mentions

| | Total | Main Purpose | |
|-------------------------------------|-------|--------------|------|
| | | V/P | VFR |
| Total (N) | 723 | 527 | 196 |
| TV ad | 13.1 | 12.5 | 14.8 |
| Directions to places (i.e. maps) | 0.4 | 0.4 | 0.5 |
| Information on cd rom | 0.3 | 0.4 | 0.0 |
| Travel brochures in general | 1.4 | 1.9 | 0.0 |
| Magazines | 2.6 | 2.5 | 3.1 |
| Tourism ads | 1.2 | 1.7 | 0.0 |
| Positive word of mouth | 1.8 | 1.9 | 1.5 |
| Internet searches | 0.3 | 0.4 | 0.0 |
| Travel and tourism books in general | 2.2 | 2.5 | 1.5 |
| Heard about NL music | 0.3 | 0.2 | 0.5 |
| Travel magazines | 0.4 | 0.6 | 0.0 |
| NL tourism website images | 0.3 | 0.4 | 0.0 |
| Travel video | 0.1 | 0.2 | 0.0 |
| Tours (when and where they start) | 0.6 | 0.6 | 0.5 |
| Campsite information | 0.3 | 0.2 | 0.5 |
| Read about weather | 0.1 | 0.2 | 0.0 |
| Catchy music in TV ad | 0.7 | 0.6 | 1.0 |
| Read about outports/ communities | 0.3 | 0.0 | 1.0 |
| Read about Marble Mountain | 0.1 | 0.2 | 0.0 |
| Newspaper ad | 0.7 | 0.9 | 0.0 |
| NL tourism packages (literature) | 0.7 | 0.9 | 0.0 |
| Mention of photography | 0.1 | 0.2 | 0.0 |
| Accommodation information | 0.1 | 0.2 | 0.0 |
| Places where you can eat | 0.1 | 0.2 | 0.0 |
| Information conferences | 0.1 | 0.2 | 0.0 |
| Old Perlican article | 0.1 | 0.0 | 0.5 |
| Visitor information centre material | 0.3 | 0.0 | 1.0 |
| Documentary | 0.1 | 0.2 | 0.0 |
| Print ads | 0.1 | 0.0 | 0.5 |
| Library reference material | 0.1 | 0.2 | 0.0 |
| Be aware of moose | 0.1 | 0.2 | 0.0 |
| Other Mentions | 38.7 | 37.6 | 41.8 |

NOTE: Percentages may exceed 100% due to multiple responses

4.3 Comparison of Newfoundland and Labrador Vacation to Maritime's Vacation (Q7a, b, c)

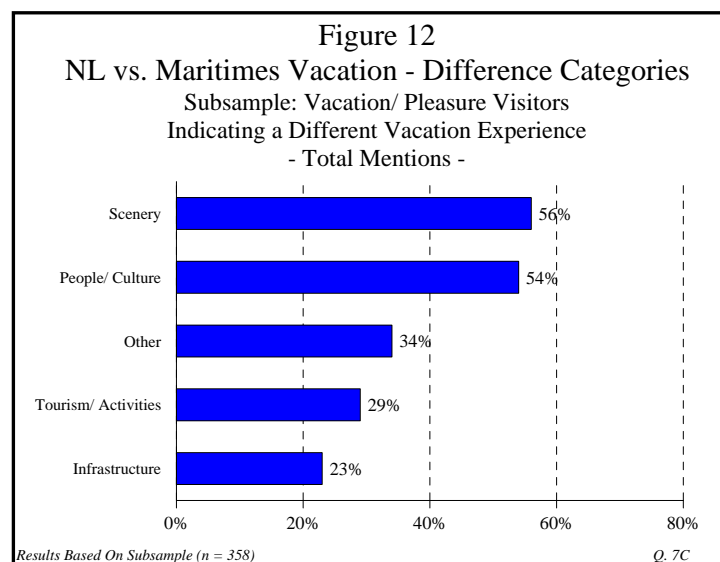
The Department has always been interested in exploring visitors' perceptions of the Maritimes and its tourism product compared to the Newfoundland and Labrador tourism product. To this end, Vacation/Pleasure visitors were asked whether they had vacationed at least two consecutive overnights in any of the Maritime Provinces within the last two years. This would provide a recent frame of reference, and identify visitors to Newfoundland and Labrador who had a basis of experience to make comparisons between the two provinces. Almost two-thirds (65%) of Vacation-Pleasure visitors had also vacationed in the Maritimes within the last two years.



Of those that vacationed in both the Maritimes and Newfoundland and Labrador (65% of all vacation/pleasure visitors), 78% indicated that the Newfoundland and Labrador vacation experience was different.

When asked, in what way(s) the experience was different, the primary areas of difference mentioned, related to *differences in scenery* (56% of all differences mentioned) and differences in the *people/culture* (54% of mentions for this same subgroup).

The verbatim comments made related to the scenery and the culture and people are presented in Appendix E.



Generally the scenery was noted as rugged, remote, isolated, wild, frontier-like, natural looking and the people were described as friendlier, helpful, open, laid back, proud, and non-judgmental.

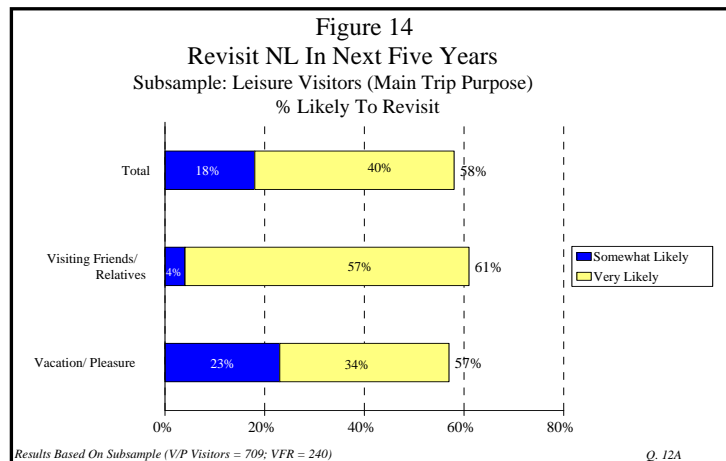
4.3.1 Regional Differences

While the differences in scenery were the most frequently mentioned within all regions, there were some regional differences noted. Maritimers more frequently mentioned tourism activity differences compared to other groups (almost twice as frequently as Ontarians). Americans and other International visitors mentioned infrastructure differences (45% and 31% compared to 18% of Ontarians and other Canadians and 10% of Maritimers). Canadians outside of Ontario and the Maritimes indicated differences between the people of Newfoundland and Labrador and the Maritimes to a greater extent; yet Maritimers and Ontarians also mentioned differences in the people as the top or second mention. It should be noted that the sample sizes by region are much lower on this question compared to other questions and therefore the percentages are much more volatile. However, this said, the differences are dramatic in some cases.

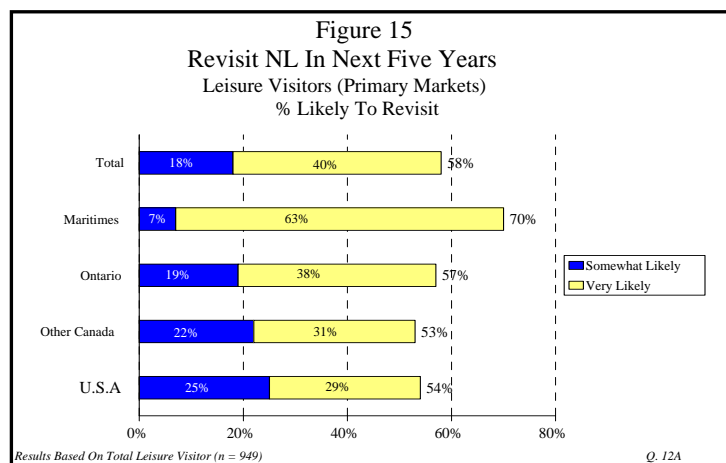
5.0 The Visit Experience

5.1 Likelihood of Repeat Visits (Q12 a, b,c)

Fifty-eight percent of leisure visitors were likely to visit Newfoundland and Labrador again within the next 5 years. The percentage of VFR visitors very likely to visit is significantly higher than the percentage of Vacation/Pleasure visitors very likely to return to the Province. Interestingly, though, just over one third of Vacation/Pleasure visitors were also very likely to return to the Province, indicating that we are a repeat destination for a significant portion of visitors.



While the percentage of those likely to return was highest among Maritime visitors it is worthy to note that over one in three Ontarians indicated they'd be very likely to visit Newfoundland and Labrador again and almost one in three Canadians and Americans indicated they'd be very likely to visit.



Many people indicated coming back to see things and/or places that they missed. Those who indicated they were not likely to return, most frequently cited wanting to visit other places. There was some mention, albeit limited, of the cost to travel; age and health reasons and a few mentions of the weather and the road conditions.

A profile of Vacation/Pleasure visitors showing an interest in coming back to Newfoundland and Labrador follows

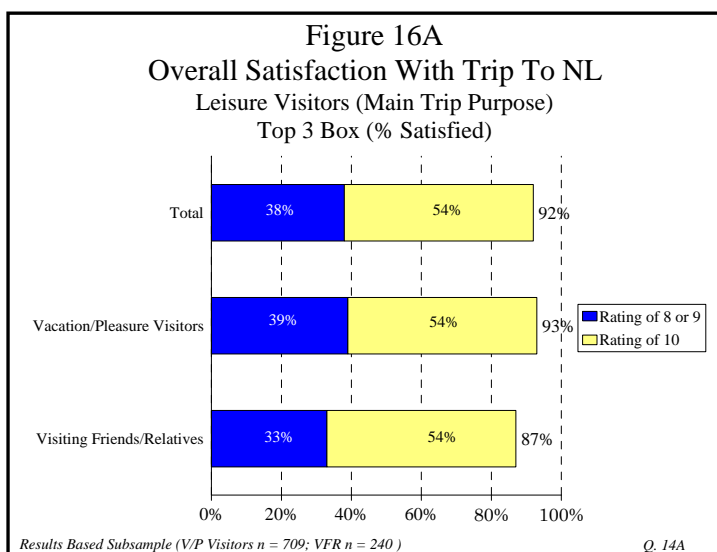
Demographics for Vacation /Pleasure Visitors.

| | | Total | Likelihood to Return | |
|------------------|-----------------------------|-------|----------------------|-------|
| | | | Yes | No |
| Total (N) | | 485 | 364 | 121 |
| Gender | Male | 41.4% | 43.4% | 35.5% |
| | Female | 58.6% | 56.6% | 64.5% |
| Total (N) | | 603 | 359 | 244 |
| Age | <45 | 21.9% | 19.8% | 25.0% |
| | 45-64 | 55.2% | 56.0% | 54.1% |
| | 65+ | 22.9% | 24.2% | 20.9% |
| Total (N) | | 675 | 400 | 275 |
| Education | HS or Less | 12.3% | 13.3% | 10.9% |
| | Some PS | 14.2% | 12.5% | 16.7% |
| | Grad PS | 73.5% | 74.3% | 72.4% |
| Total (N) | | 641 | 380 | 261 |
| Income | Less than \$40,000 | 9.4% | 7.9% | 11.5% |
| | \$40,000 to \$69,999 | 34.0% | 36.8% | 29.9% |
| | \$70,000 to \$99,999 | 28.4% | 26.6% | 31.0% |
| | \$100,000 or more | 25.9% | 26.6% | 24.9% |
| | Refused | 2.3% | 2.1% | 2.7% |
| Total (N) | | 682 | 404 | 278 |
| * Region | Maritimes | 15.8% | 19.3% | 10.8% |
| | Ontario | 41.8% | 42.8% | 40.3% |
| | Other Canada | 12.6% | 11.1% | 14.7% |
| | U.S.A | 26.5% | 24.8% | 29.1% |
| | Other | 3.2% | 2.0% | 5.0% |

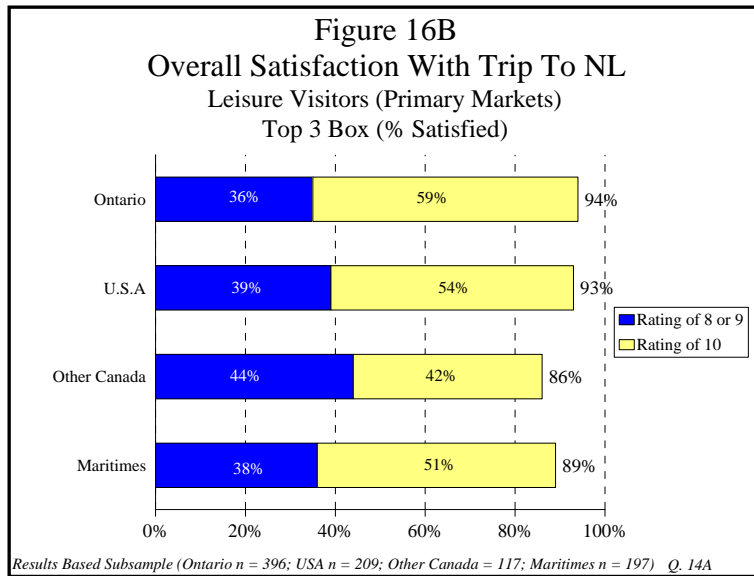
* NOTE: Results are significantly different across LIKELIHOOD TO RETURN at level 0.05

5.2 Level of Satisfaction (Q14)

Visitors love Newfoundland and Labrador. Almost all leisure visitors were quite satisfied with their trip to Newfoundland and Labrador with a reported overall average satisfaction rating of 9.2 out of 10. Vacation/pleasure visitors reported a statistically higher level of satisfaction than did VFR visitors reporting a 93% Top 3 Box Score compared to 87% for VFR visitors. As seen in the graph, this difference comes from those rating their satisfaction 8 or 9, yet both groups were extremely satisfied.



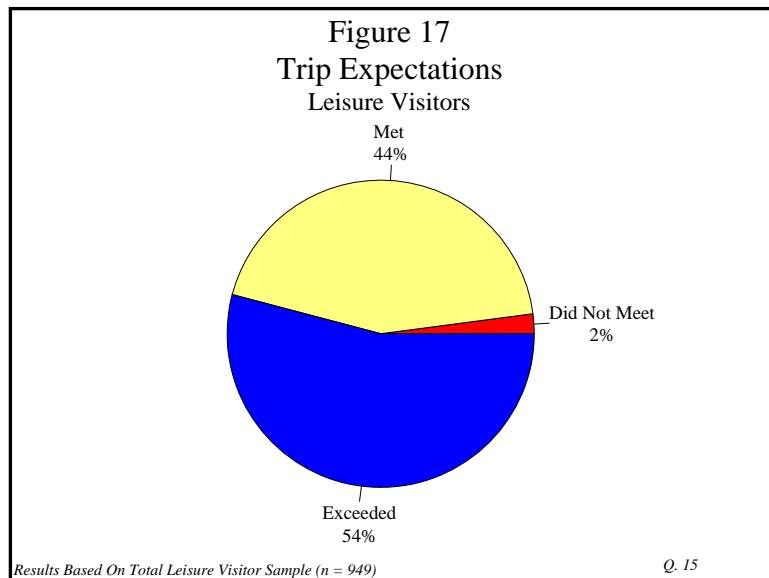
Similarly, while residents from all regions reported high levels of satisfaction, there were some regional differences identified. Ontario had the highest proportion of visitors citing a satisfaction level of 10, followed closely by the USA and then the Maritimes. Residents from other Canadian provinces reported relatively slightly lower levels of satisfaction; however these ratings were also quite high.



This trend was even more pronounced among first time leisure visitors from Ontario and USA markets. Sixty-four percent of first time visitors from both Ontario and the USA gave a satisfaction rating of 10; an analysis was conducted to assess whether there were any differences between those individuals who were extremely satisfied (i.e. gave the highest satisfaction rating of 10) and those who were giving ratings of 8, 9 compared to those who provided lower ratings. There were no significant differences across these groups based on age, education or income. However, a higher proportion of females and Ontario visitors were extremely satisfied. This group of extremely satisfied people also stayed the longest in the Province, reporting an average of 12.5 nights spent in the Province compared to 11.3 from those giving 8 or 9 ratings and 9.8 for those giving ratings less than 8.

5.3 Meeting Expectations (Q15)

Given the high levels of satisfaction with the visit, very few leisure visitors, only 2%, indicated that the trip did NOT meet their expectations. The trip **exceeded** expectations for 54% of leisure visitors and **met** expectations for the remaining 44%. This percentage for exceeding expectations drops to 45% for first time leisure visitors, indicating that there are a percentage of visitors who love Newfoundland & Labrador, have been here more than once, and have their expectations exceeded all the time.



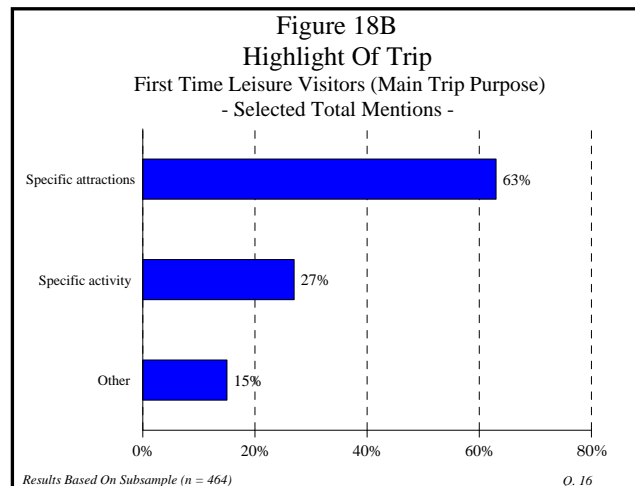
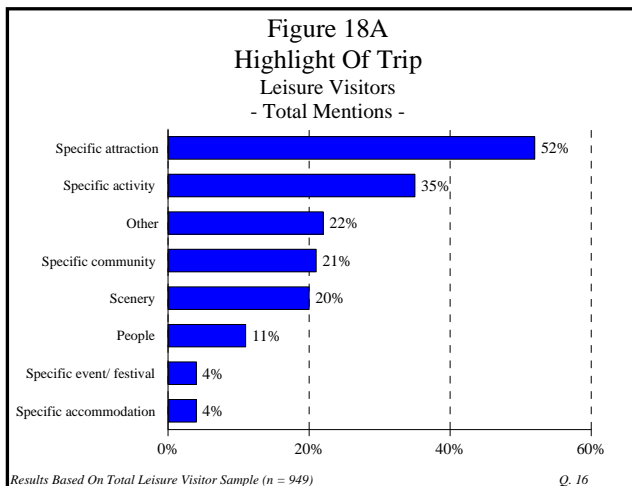
A pattern similar to that noted in satisfaction levels was also noted in the degree the trip met expectations of leisure visitors. A greater percentage of Ontarians and Americans felt the trip exceeded their expectations (57% and 67% respectively) compared to 41% of Maritimers and 44% of residents from the other remaining provinces of Canada.

Looking at visitors based on the reason for their visit, the majority of those who came for Vacation/Pleasure (60%) had their expectations exceeded, compared to just over one-third (37%) of VFR visitors. Given the high degree of satisfaction with the destination experience, it is safe to say that these VFR visitors had different expectations prior to their visit than did the Vacation/Pleasure visitor.

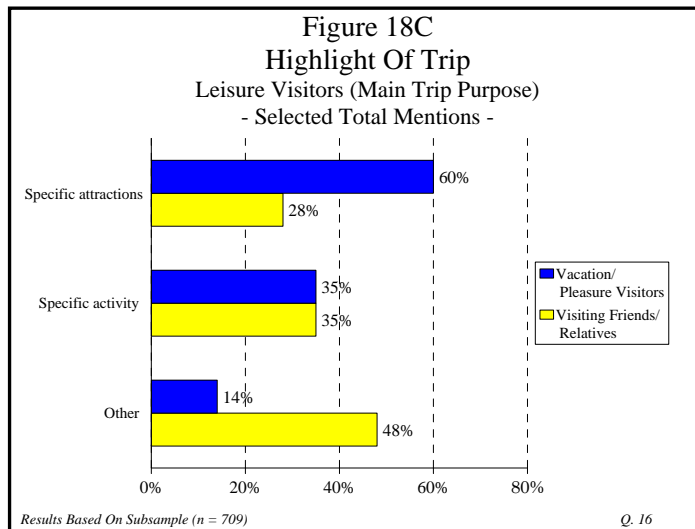
5.4 Highlights of Trip (Q16)

For leisure visitors, the most frequently mentioned trip highlights related to specific attractions, followed by specific activities. Community and scenery highlights received a similar number of mentions at 21% and 20% respectively. Highlights relating to “people” represented 11% of all mentions by these visitors. A sample of items mentioned is provided in Appendix F.

For those leisure visitors in Newfoundland and Labrador for the first time, specific attractions and scenery related mentions represented a higher proportion of mentions compared to mentions by **all** leisure visitors (63% versus 52% for attractions and 27% versus 20% for scenery).

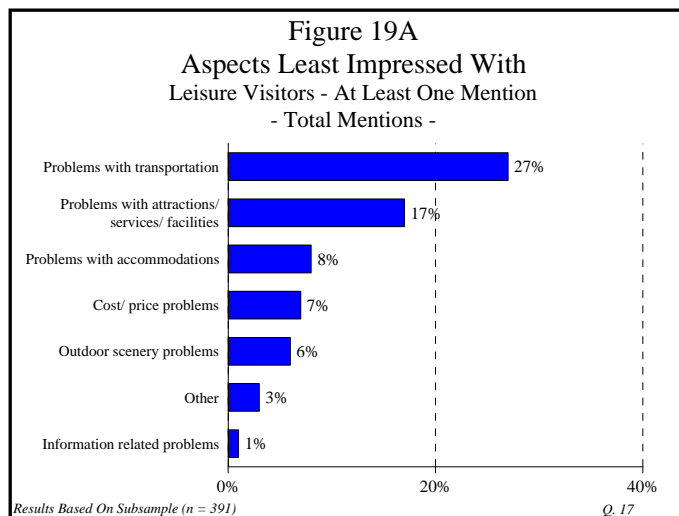


Attractions were mentioned more frequently than specific activity highlights especially for those visiting for Vacation/Pleasure reasons. For this group attraction highlights were mentioned 60% of the time, compared to activities, being mentioned 35% of the time. VFR visitors most frequently mentioned highlights related to family and friends (48% of mentions) followed by highlights of specific activities and then attractions.

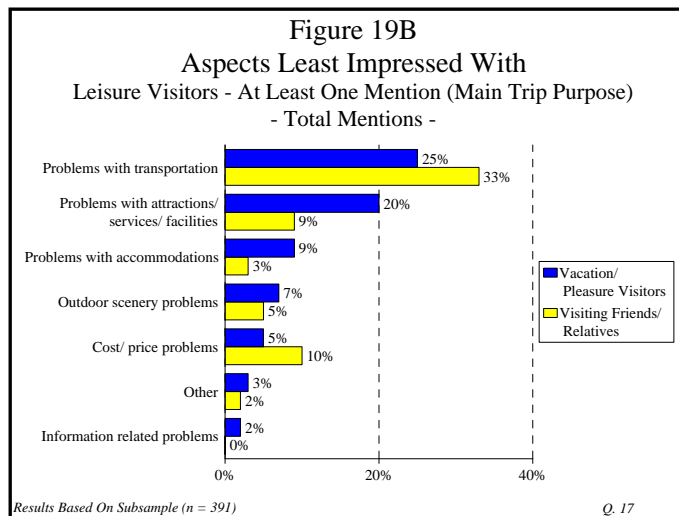


5.5 Aspects Least Impressed With (Q17)

Just over forty percent of leisure visitors were unable to provide an answer when asked to identify aspects of their vacation with which they were least impressed. Almost half of these people stated that they had no negative comments. For those leisure visitors giving a response, problems related to transportation were the most frequently mentioned area for improvement with 27% of mentions; followed by problems with attractions/services/facilities (17% of mentions). There were also mentions, although fewer, of problems with accommodations, issues related to cost and issues related to the outdoors/scenery.



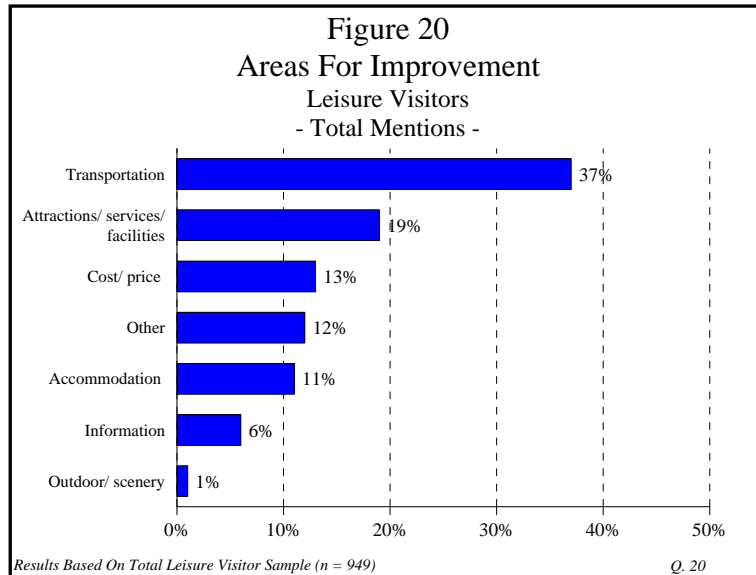
Problems of transportation were mentioned more often by those individuals who came to the Province to visit friends and relatives compared to mentions made by Vacation/Pleasure visitors (33% versus 25% of mentions). Costs were also a bit more of an issue for the VFR visitor. Problems with attractions/services and facilities were more frequently mentioned by Vacation/Pleasure visitors than by those visiting friends and relatives. A listing of items mentioned is provided in Appendix G.



Areas of transportation that visitors were least impressed with for the most part related to the transportation carrier (services, schedules), with minor mention of the condition of roads and the availability of roadside services (signage, rest stops, and look-outs).

5.6 Areas for Improvement (Q20)

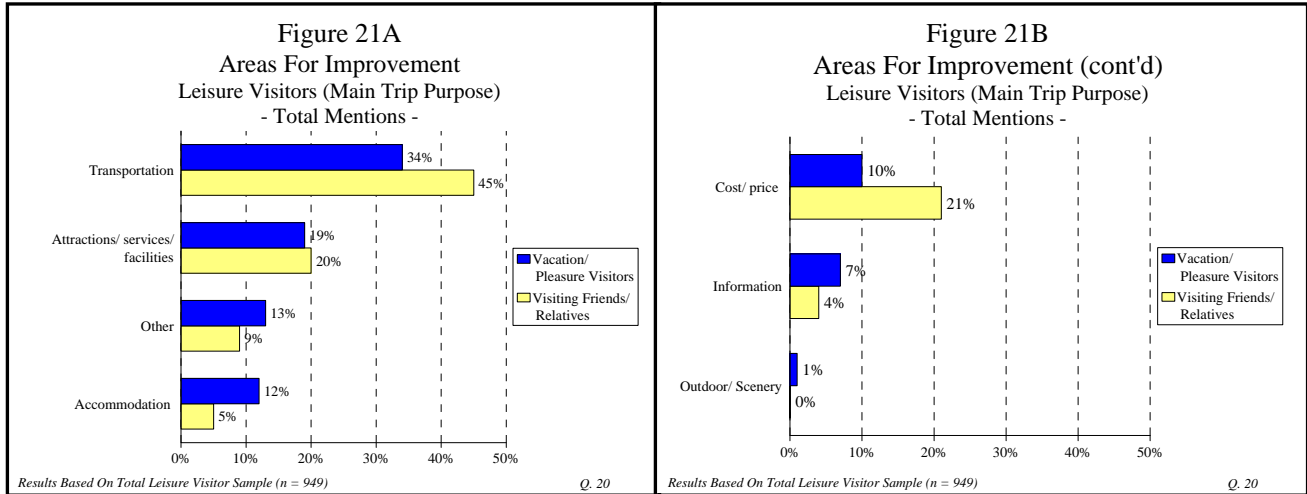
Despite the high degree of satisfaction with the Newfoundland and Labrador visit, leisure visitors did suggest improvements. Similar to the findings in the previous section, the most frequently mentioned area for improvement was transportation. Generally, comments related to roads, ferry service and airline access.



There was also mention of improvements that could be made to the tourism product including attractions, services and facilities and accommodations. The type of items mentioned included more retail outlets and restaurants, more things to see and do including, music, hiking trails, and fishing. Issues of cost and prices were also mentioned. A complete list of items mentioned is provided in Appendix H.

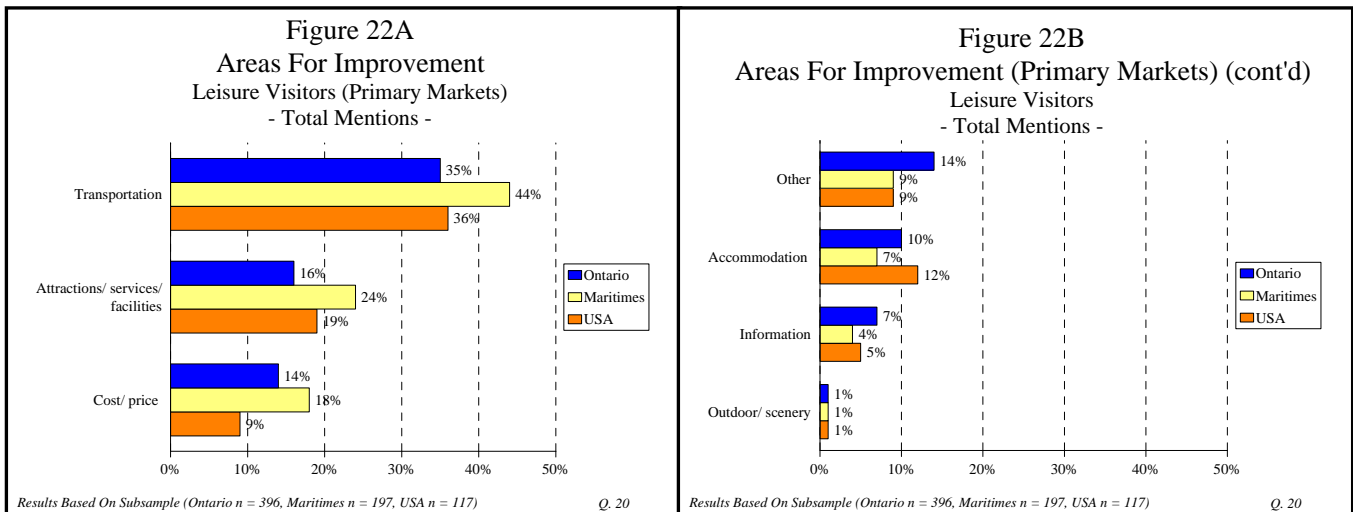
5.6.1 By Main Purpose

While most frequently mentioned by all groups, cost and transportation issues, were even more frequently mentioned by those who came to the Province to visit friends and relatives. Interestingly, this pattern persisted, even when analyzing the responses for *first time* visitors who cited their main reason for coming to the province was to visit friends and relatives.



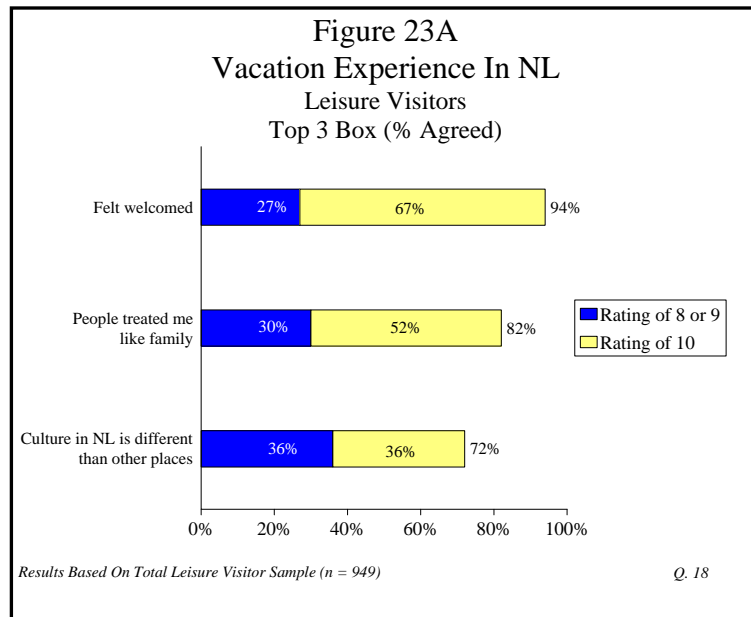
5.6.2 By Market

Similar to the main purpose VFR group, cost and transportation were also more frequently mentioned by Maritimers than by visitors from other markets, as were improvements to attractions/services and the cost. For leisure travelers from all regions, the rank orders of areas for improvement were similar. Improvements to attractions, services and facilities were mentioned as frequently as cost.

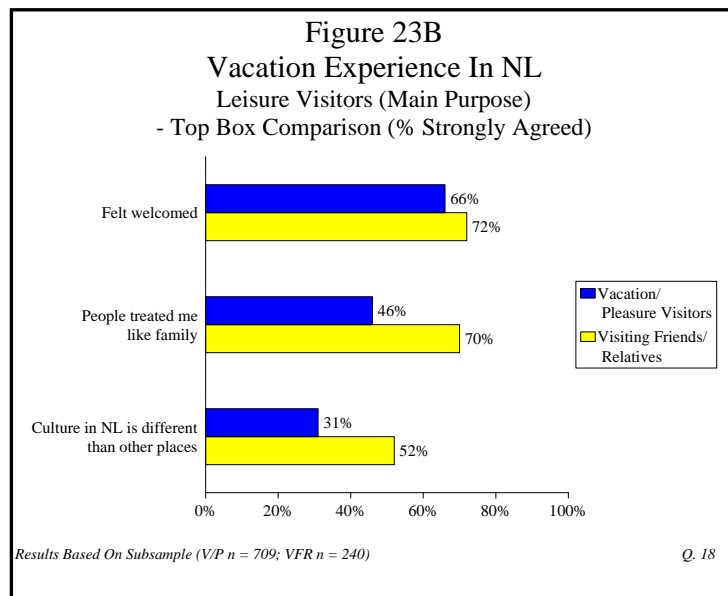


5.7 Reaction to Specific Dimensions of the Vacation Experience (Q18 A –C + 18 BB)

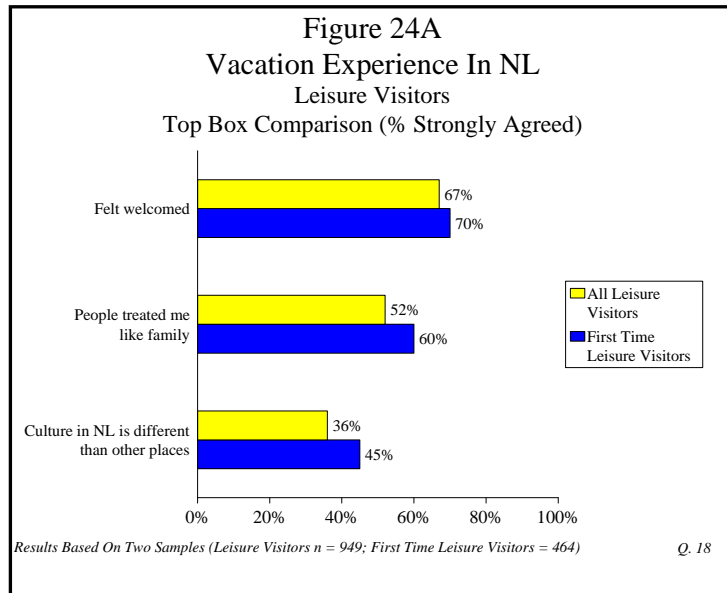
All leisure visitors were asked whether they agreed with three statements related to describing their vacation experience in NL. There was a strong sense of *welcome* experienced by visitors to Newfoundland and Labrador as evidenced by the high level of agreement with that statement among all leisure visitors, with 94% giving a Top 3 Box rating of 8, 9 or 10. This rating was followed by 82% of leisure visitors indicating that they were *treated like family* and by 72% who indicated that *the culture in the Province is different from other places*.



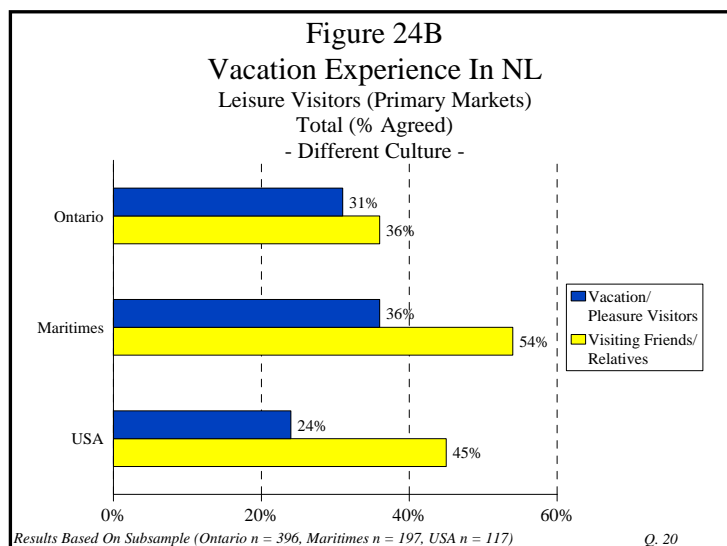
Given these high levels of agreement, further analysis was conducted to assess whether there were any differences across subgroups of leisure visitors based on the reason for their visit. The greatest differences between the Vacation/Pleasure and VFR visitor appeared in the Top Box ratings. Overall, the levels of agreement were higher among VFR visitors than Vacation/Pleasure visitors on the aspects measured.



In addition, a review of the top box rating (i.e. the highest rating of 10) shows that the level of agreement intensifies among **first time** leisure visitors. Seventy percent of first time visitors felt welcomed in the Province and closely related to this, 60% felt they were treated like family. On the issue of whether the culture is perceived to be different from other Provinces, 45% of first time visitors strongly agreed that it was. In all instances more first time leisure visitors strongly agreed that they experienced the aspect.



On the dimension of “the culture difference”, leisure visitors from the primary markets of Maritimes and Ontario provided the highest agreement ratings. Visitors from other Canadian provinces and the USA gave lower ratings, however this dimension still had relatively low ratings compared to other statements regardless of market.



The same pattern was noted across regions in that “feeling welcome” secured the highest levels of agreement, followed by being “treated like family” and then the “culture being different”. Again, within regions, VFR visitors reported stronger levels of agreement.

Those who indicated that the culture was different gave responses related to the differences in the people in Newfoundland and Labrador, indicating that our culture is equated to our people in the minds of visitors. A list of aspects mentioned is included in Appendix I. These responses generally related to personality traits (friendly, open, hospitable, warm, caring, humorous, relaxed, humble, outgoing, non-judgmental) and also included mention of music, dialects and the European influences on people.

Compared to other regions, a greater proportion of mentions from first time US and other International visitors related to differences not as specific to the character of the people. People-related differences in culture were, nonetheless, still the most frequently cited by these groups. A sample of verbatim comments by these non-Canadians is presented below:

Selected Verbatim Comments from "Other Canadians" and US Residents

- Different cuisine
- People are friendlier/ more polite
- Community minded/ everyone knows everyone
- Behind the times/ backwards/ primitive
- Few occupational choices/ financial hardships
- Remote/ isolated island
- Small, quaint villages
- People are more relaxed/ laid back
- Variety of lingos/ dialects/ accents
- People are more open
- People are very helpful
- They are in tune with the natural world
- Different atmosphere
- Low population means low crime
- Economy based on government programs
- Older history than the rest of North America
- Towns forced to be self sufficient
- Retail stores were not specialized
- Irish/ British influences
- Not overly commercialized
- Quieter
- Like Australia
- More of a rural setting
- The lilting, subtle Irish accent and lifestyle...
- Other trips to Canada exposed us to Eng/Fr accents and cultures, but, in many ways felt more European
- The effect of the terrain on culture and life
- Life is simpler
- There appears to be less materialism, although I think that is changing
- Less populated
- Acadian influences were new for us (some good Acadian food).
- Because of the isolation, probably more feeling of cohesiveness of the people.
- Being Irish we noticed a lot of Irish-ness, particularly down the east coast.
- Cultural mix. Never lock doors! Hospitality, heartfelt and not motivated by tourist dollars.
- Dialect. Small-town atmosphere. Fishing 'villages' turned town. Television. Humor.
- Different accent and dialect
- The towns and villages and houses were designed differently
- Different food (e.g. cod tongues)
- Everyone was very friendly and accommodating. Some of the language and local food is a bit interesting.
- Fishing history , Irish and Scottish accents , different peninsulas
- Great emphasis on visual and performing arts.
- How far back the history is tracked!
- I liked the rustic feel and the awareness of closeness to the ocean. It felt more European than most parts of Canada.

- Dangers associated with wresting a living from the sea. People seem more helpful and interested in each other.
- It is safe and friendly. I had no hesitation cycling in remote areas or on the highways. People were very welcoming.
- It seemed more 'old world,' Traditions were strong, stories and plays about the history were colorful and interesting.
- Its a very old culture with seafaring roots.
- Less commercial orientation. emphasis on family and natural resources.
- More European..not as Canadian or American... can experience the influence of the Scots, Irish, English, Basques,etc
- More relaxed. Reminds me a bit more like NE England and Ireland
- More rural
- More unique... different from US... different musical tastes, food, and more friendly
- More unique...less of it.
- Much more European than other anglophone places in North America, more laid back and relaxed
- No fast food, few neon signs, much slower pace.
- Not that different. In fact we don't like Bush and neither do most Canadians.
- Small fishing villages, not found in New Hampshire.
- Strong Irish influence, mostly small towns so people are trusting and friendly
- The climate and geography of the province has shaped the attitudes and understanding of the people.
- The culture was strongly impacted by fishing and the problems associated with it.
- The degree of family closeness and the effort to educate their children appears to very important.
- The focus on community life is more pronounced.
- The good old days are still alive and well in Nfld.
- The interaction with the sea has obviously had a major effect.
- People are friendly and welcoming like in Ireland. Fascinated by so much variety--different accents, etc.
- The people are relaxed and appear stress free.
- The people in Newfoundland seem to be strongly connected with their cultural roots.
- The small undeveloped towns. Small markets and rural areas.
- Very relaxed, very open and friendly to visitors. In many ways like an old fashioned ideal stereotype of England.
- While mostly rural, there was a welcoming attitude. Not pretentious, caring without being intrusive.

There were also noted differences across the three “satisfaction” groups in terms of their attitudes toward the three aspects of a Newfoundland and Labrador vacation. Average levels of agreement were highest for the high satisfaction group and declined as the level of satisfaction did.

Table 11: Leisure Visitors: Mean Ratings by Satisfaction Groups

| Statement | | Total | Satisfaction Groups | | |
|--|------|-------|---------------------|----------------|----------------|
| | | | Extremely Satisfied | Very Satisfied | Less Satisfied |
| * People treated me like family | N | 946 | 513 | 357 | 75 |
| | Mean | 8.8 | 9.3 | 8.3 | 7.9 |
| * Culture in Newfoundland and Labrador is different than other places. | N | 935 | 508 | 351 | 75 |
| | Mean | 8.3 | 8.7 | 7.9 | 7.6 |
| * I felt welcomed in the Province. | N | 944 | 512 | 357 | 74 |
| | Mean | 9.4 | 9.7 | 9.0 | 8.8 |

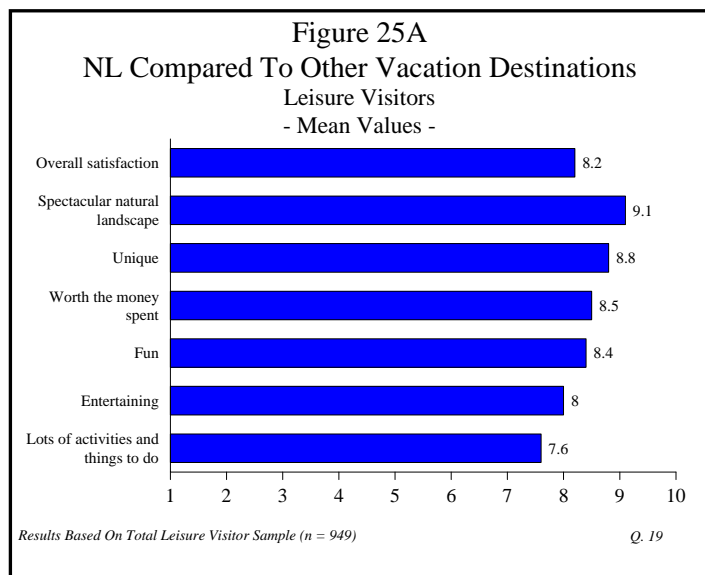
* NOTE: Results are significantly different across SATISFACTION GROUPS at level 0.05

5.8 Comparison to Other Vacation Destinations

All visitors were asked to rate various aspects of their vacation in Newfoundland and Labrador against their vacation to other destinations within the last five years. A ten-point rating was used where “1 represented the Newfoundland and Labrador vacation *being worse*” than all other destinations and “10 indicating that Newfoundland and Labrador was *better than*” all other destinations. There were seven aspects rated by respondents:

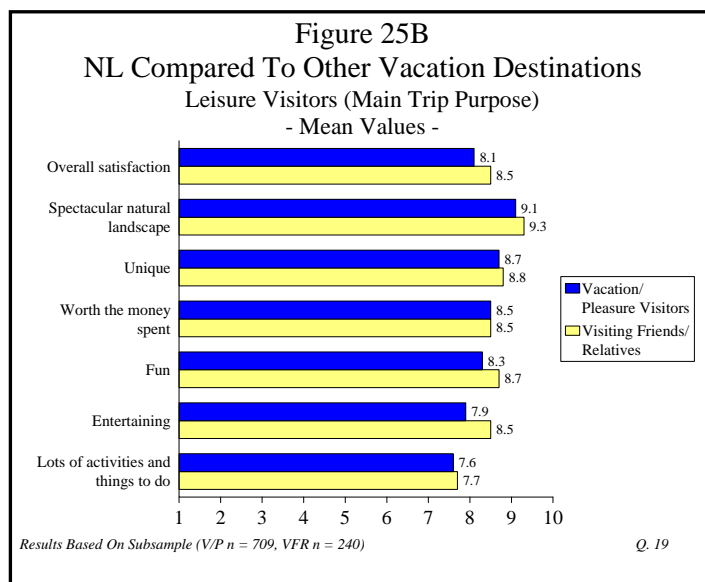
- Overall satisfaction
- Being worth the money spent
- Being unique
- Being fun
- Being entertaining
- Offering spectacular natural landscape
- Offering lots of activities and things to do

Overall, of the aspects measured, the top elements of the experience for leisure visitors (i.e. receiving the highest scores) were, *offering spectacular natural landscape* and *being unique*. Relative to other dimensions measured, the weakest aspect of the Newfoundland and Labrador vacation experience, receiving the lowest scores, although still quite high, were *being entertaining* and closely related to this, *offering lots of activities and things to do*.



5.8.1 Ratings by Trip Reason

A review of ratings based on the main reason for the trip indicates that the pattern in terms of what aspect received the highest rating to the lowest rating remained unchanged; however, the VFR visitor generally provided higher or the same ratings as Vacation/Pleasure visitors on all aspects measured. Significant differences were noted on the dimensions of *being fun* and *entertaining* and *offering spectacular landscape*.



5.8.2 Ratings by Market

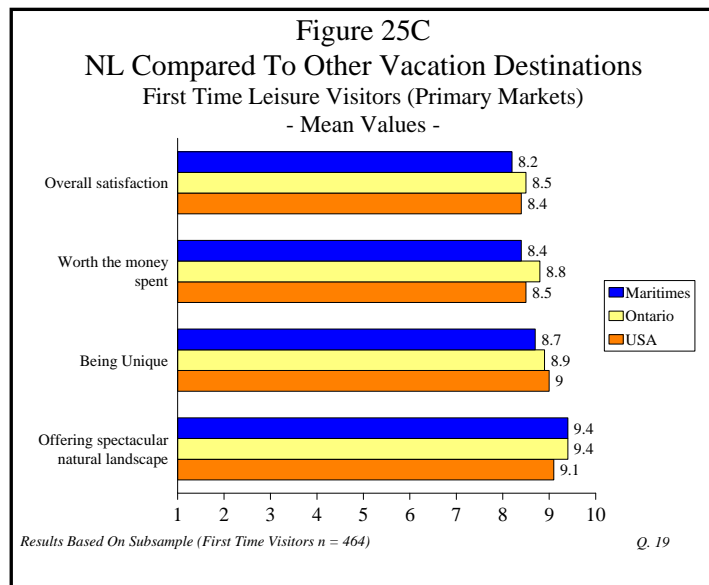
Ontarians and Americans gave the highest average rating on “being worth the money spent.” As noticed throughout the survey, International visitors (excluding the United States) provided the lowest scores on all aspects measured. However, the same rank ordering of dimensions noted among other regions persists with this market as well. Newfoundland & Labrador as a destination is most perceived to be unique and offering spectacular natural landscape, while scoring less well on being entertaining and offering lost of activities and things to do.

5.8.3 First Time Visitors by Main Purpose

There were no statistically significant differences among first time visitors with the exception of those who came to visit friends and/or relatives giving higher scores to the vacation *being entertaining*. Average scores for first time VFR visitors rating Newfoundland and Labrador as being entertaining were 8.5 compared to a rating of 8.1 by first time visitors who visited for Vacation/Pleasure purposes.

5.8.4 First Time Visitors by Market

For many dimensions measured, except the spectacular landscape, visitors from Ontario and the US seem to be closely aligned in their overall ratings of the experience, reporting average scores higher than those reported by visitors from the Maritimes and other Provinces in Canada. Maritimers visiting for the first time gave their highest rating to the spectacular landscape, giving an average rating as high as that provided by Ontarians.



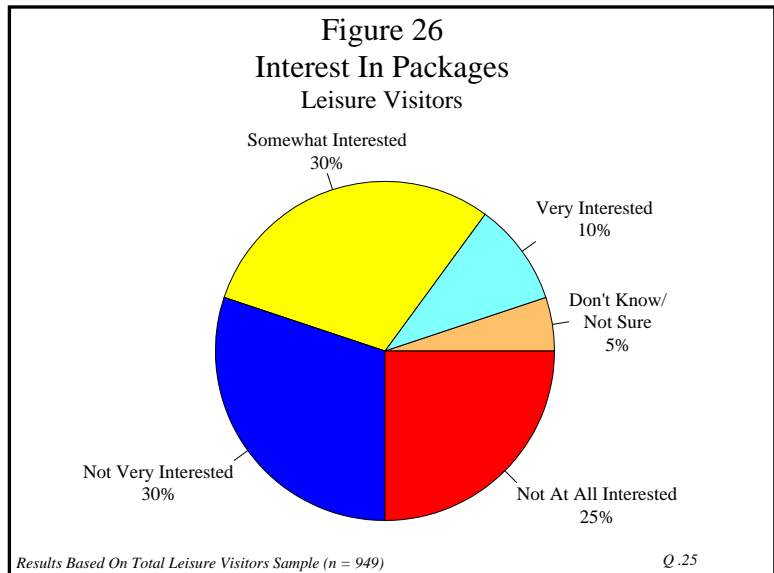
6.0 Internet and Packages: Usage and Interest

6.1 Interest in Packages

Four out of every ten leisure visitors (40%) indicated having some level of interest in purchasing packages of planned activities/itineraries had they been available during their visit to Newfoundland and Labrador. One in ten was very interested while the remaining three indicated being somewhat interested.

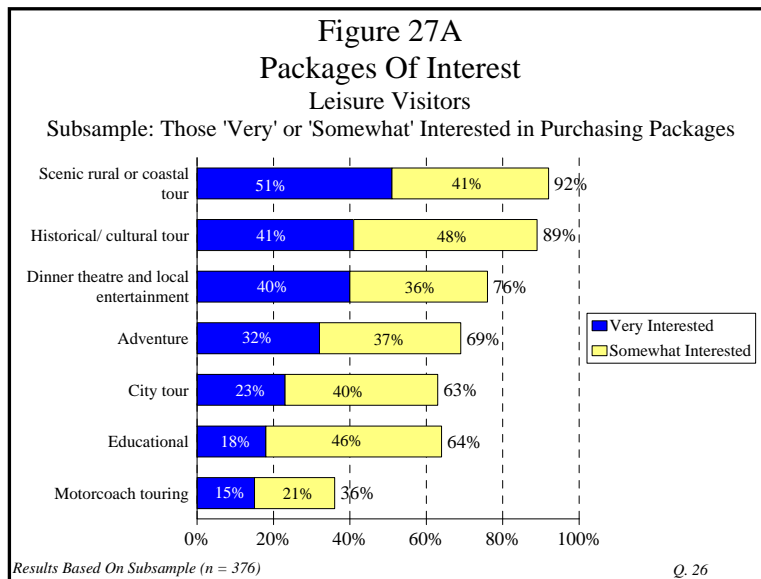
Interest in packages was slightly higher among VFR's (46% compared to 37% of Vacation/Pleasure visitors).

Looking at the markets, Americans were the least interested in packages, (27% being very or somewhat interested) compared to Maritimers, where 46% expressed an interest in packages and Ontarians, where 42% expressed an interest.



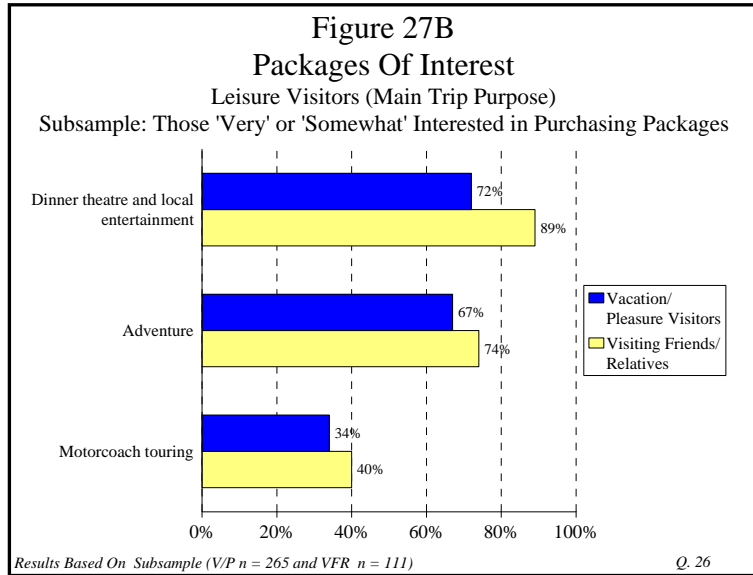
6.2 Types of Packages of Interest

Among those interested in packages (40% of leisure visitors), there was most interest in scenic rural or coastal tours, historical/culture tours and dinner theatre and local entertainment packages. Almost half of these interested in packages were **very** interested in historical/cultural tours (48%) and educational tours (46%).



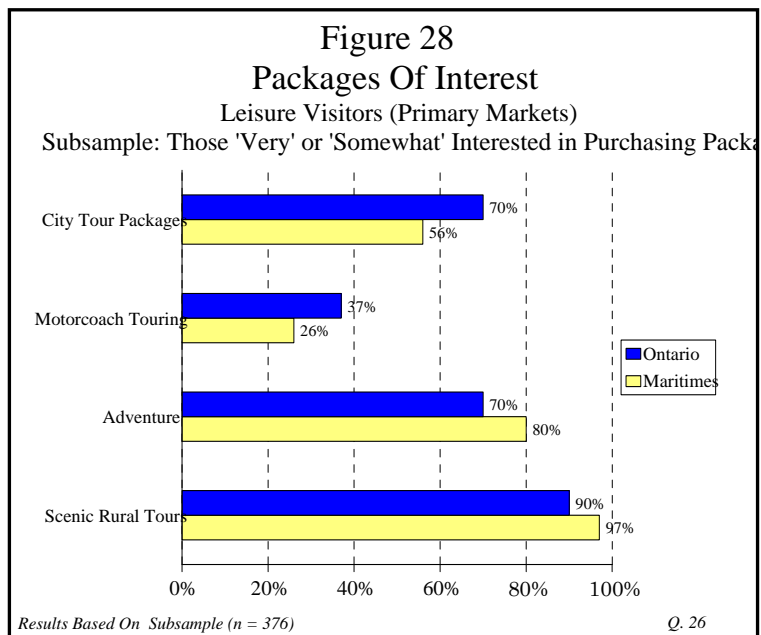
6.2.1 By Main Trip Reason

When analyzing results by the reason for the trip the patterns noted above persisted; however, there was slightly more interest noted among VFR's for *adventure and motor coach touring packages*. Yet the only statistically significant difference was VFR's interest in dinner theatre and local entertainment packages. This was also noted among first time visitors to the Province.



6.2.2 By Market

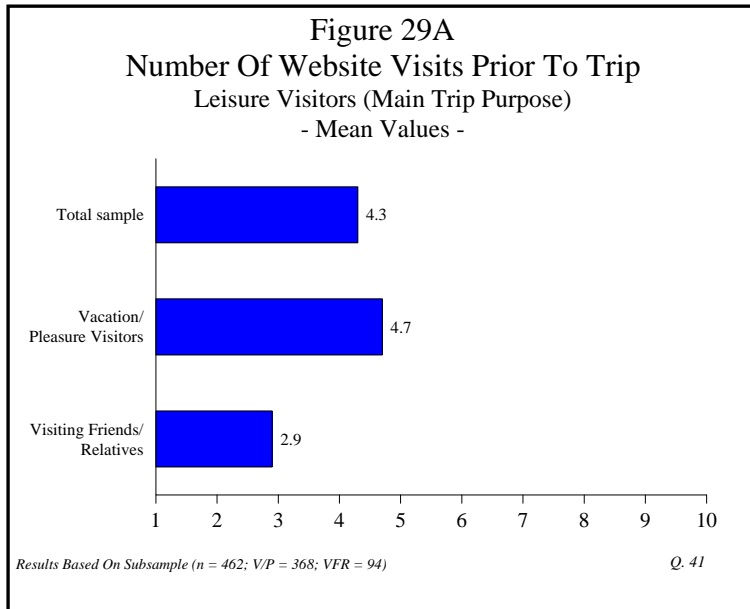
While the sample of those interested was just under 400, analysis by region produced large margins of error for the Other Canada, US and Other International regions. Margins of error for the Maritimes and Ontario were acceptable and indicated that interest by Maritimers was slightly greater than interest among Ontarians in: *adventure packages (80% versus 70% of Ontarians) and scenic rural tours (97% versus 90% of Ontarians)*. Ontarians however, showed a greater interest in city tours (70% versus 56%) and motor coach tours (37% versus 26%). This said however, within both primary markets, most interest was in scenic rural, historical cultural tours and dinner theatre and local entertainment packages.



6.3 Website Visits (Q38 to 41)

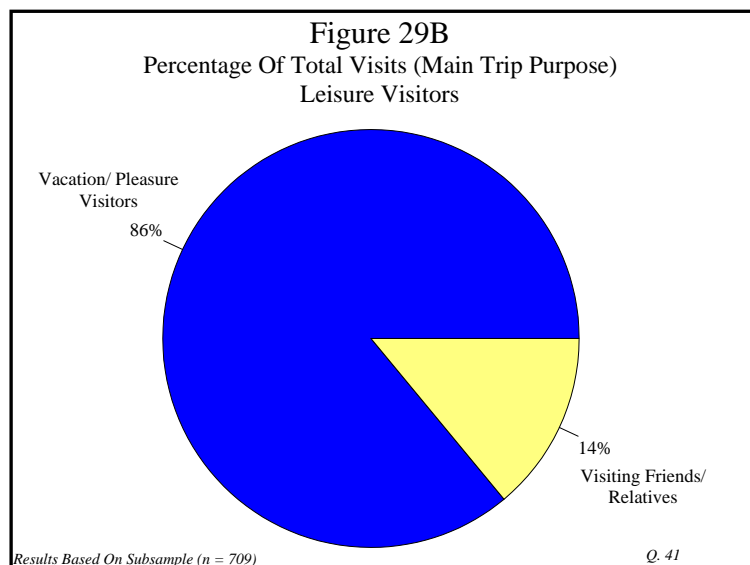
6.3.1 Frequency

Just over half (53%) of leisure visitors surveyed visited the Newfoundland and Labrador Tourism website. Of those who visited the website, the average number of visits to the site from the time they decided to come to Newfoundland and Labrador to when they actually visited was 4.3 times per person. The average number of visits increased significantly based on the main reason for the trip. Those who came for Vacation/Pleasure visited the site, on average, 4.7 times, compared to 2.9 times for those coming to visit friends and relatives.

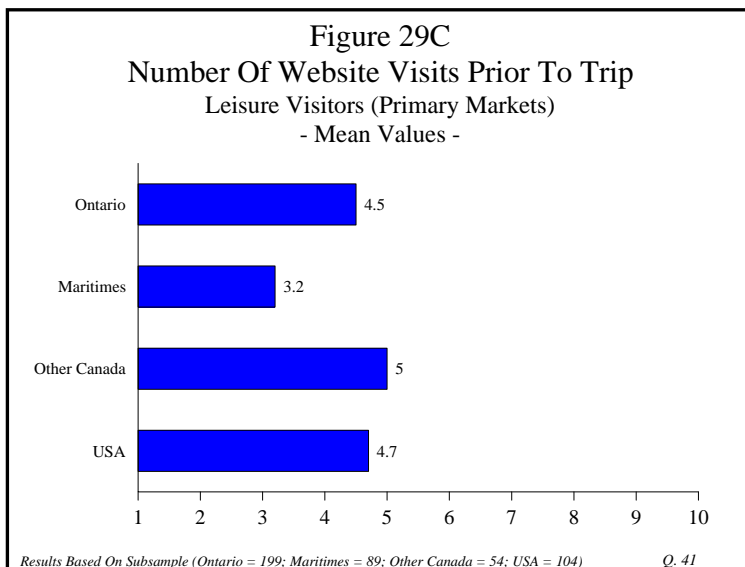


Looking at the distribution of website visits, a greater percentage (38%) of VFR visitors visited the website only once, compared to 23% of Vacation/Pleasure visitors. Similarly, and as reflected by the average number of visits, just over 70% of VFR visitors went to the website three or less times compared to 50% of Vacation/Pleasure visitors. Approximately 15% of Vacation/Pleasure visitors visited the site 10 or more times, just over double the percentage of visiting friends/relatives visitors.

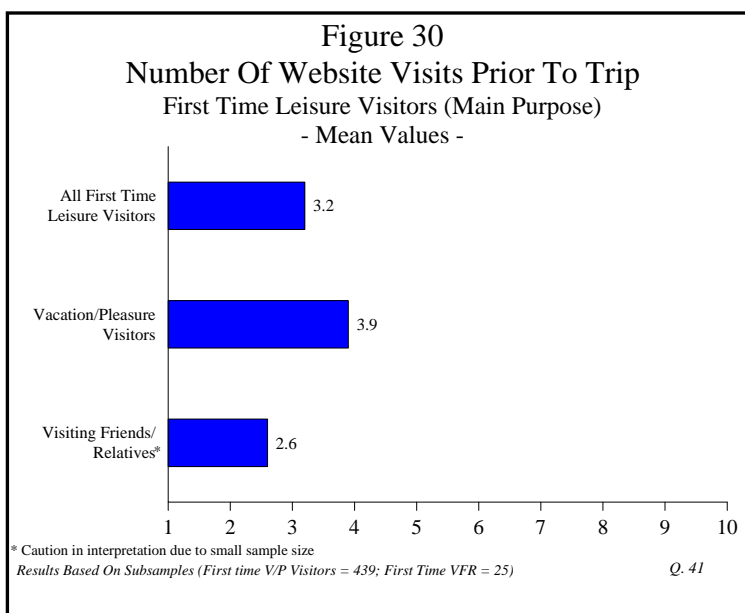
In total, leisure visitors accounted for 1,990 visits to the Tourism Newfoundland and Labrador website, with Vacation/Pleasure visitors responsible for 86% of these visits. The majority of visits to the website by VFR visitors were made by first time visiting friends/relatives visitors to the Province, accounting for 83% of website visits by VFR visitors.



Looking at individual markets, Maritimers visited the website slightly less frequently than did visitors from other regions with an average of 3.2 visits compared to 4.5 by Ontarians and 4.7 for Americans and 5.0 for visitors from other regions in Canada outside the primary Maritimes and Ontario markets.



Interestingly, first time visitors visited the website less, with an average of 3.2 visits. Looking more closely at this subgroup indicates that the first time Vacation/Pleasure visitor visited the website more frequently than first time VFR visitors - 3.9 times, on average, compared to 2.6 times for VFR visitors.



A summary of the number of initial website visits by region are presented below.

Table 12: Leisure Visitors Visiting Website Prior to Trip: Number of Hits by Region

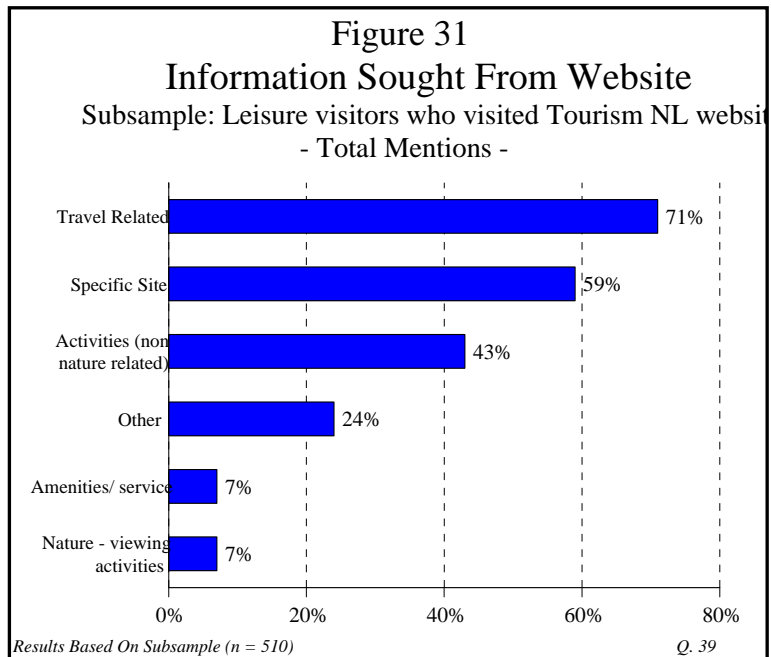
| Region | Total Visits | % Total Visits | # of People | % People | Min # Visits | Max # Visits |
|--------------|--------------|----------------|-------------|---------------|--------------|--------------|
| Maritimes | 285 | 14.3% | 89 | 19.3% | 1 | 25 |
| Ontario | 887 | 44.6% | 199 | 43.1% | 1 | 40 |
| Other Canada | 268 | 13.5% | 54 | 11.7% | 1 | 20 |
| U.S.A | 490 | 24.6% | 104 | 22.5% | 1 | 30 |
| Other | 60 | 3.0% | 16 | 3.5% | 1 | 12 |
| Total | 1990 | 100.0% | 462 | 100.0% | 1 | 40 |

6.3.2 Information Sought (Q39 & Q40)

Among those who visited the website (53% of leisure visitors), information related to traveling here was the most sought, followed by information on specific sites and non-nature-related activities.

Examples of the specific type of information mentioned are included in Appendix J.

The vast majority (81%) of website visitors found everything they were looking for on the site. Information that visitors wanted, but were unable to find, included some very specific things such as coastal boats to Labrador, road conditions, local guides, boats from NL, and boat rentals. A complete list is provided in Appendix K.

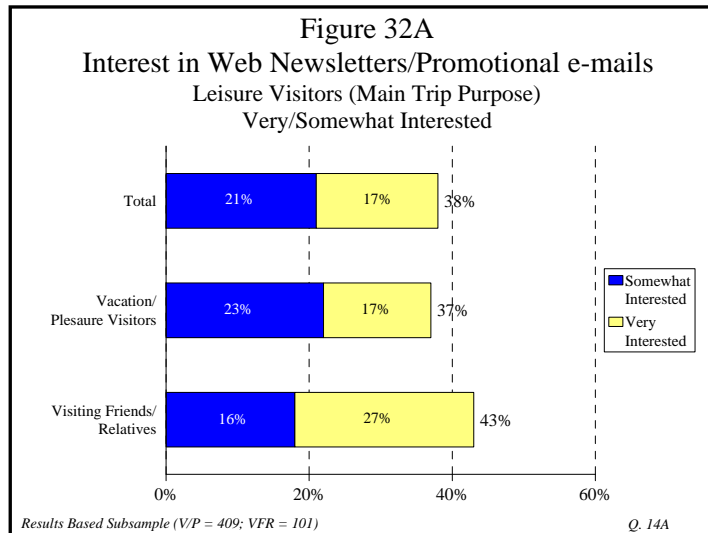


6.3.3 Interest in Internet Newsletter/Promotional E-mails

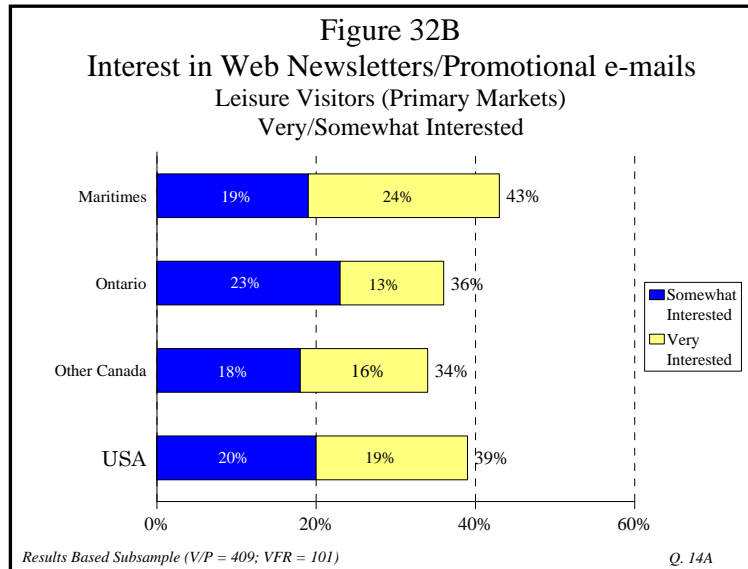
Overall, interest in web-based newsletters or promotional e-mails was moderate, with 38% of all leisure visitors expressing interest. Among those who actually visited the website this moves slightly to 40%. This level of interest is similar for first-time visitors to the province.

There are indications that interest may be slightly higher among VFR visitors (43%, compared to 37% of

Visitors/Pleasure visitors expressing an interest), with a greater proportion of VFR visitors being “very” interested (27% compared to 17% of Vacation/Pleasure visitors).



Looking at geographic markets, interest levels are similar; however a slightly higher percentage of visitors from the Maritimes indicated they would be very interested in newsletters or e-mail promotions. (24% compared to 13% of Ontarians)



It is interesting to note that while there were differences in interest levels among leisure visitors depending upon whether they had visited the Newfoundland and Labrador website prior to their trip, one-third of those leisure visitors who had NOT visited the site still expressed an interest in receiving web newsletters or promotional e-mails (13% very interested and 20% somewhat interested).

7.0 Conclusions and Implications

7.1 Destination Features Sought & Motivators to Visit

7.1.1 Conclusions

- Vacation/Pleasure visitors to Newfoundland and Labrador are looking for *unique and off-the-beaten-track* destinations where they *can meet people and experience the culture*. Newfoundland and Labrador is delivering these desired elements. There is also a match between the level of satisfaction and the importance of these destination attributes (meeting people and experiencing the culture type of vacations). This is evidenced among those Vacation/Pleasure visitors who expressed the highest level of satisfaction with their visit to the Province. These visitors indicated, to a greater extent than other visitors, that they seek destinations where they can meet the people and experience the culture.
- Few visitors are primarily seeking destinations where they can attend many local entertainment events or participate in the culture. This reinforces the belief that for the majority of the non-resident Newfoundland and Labrador target market, activities, local events and “doing things” are not factors that primarily drive their choice of vacation destination.
- Within the primary markets of Ontario and the Maritimes, the top destination feature sought was “*meeting people and experiencing the culture*”; however, Ontarians were looking for this slightly more so than Maritimers.
- The vacation/pleasure visitor from the Maritimes or other Canadians, are likely to respond well to messages related to meeting people and experiencing the culture; however, fewer are seeking this compared to vacation/pleasure visitors from Ontario and the United States.
- American visitors to the province want to visit unique and off-the-beaten-track destinations and will therefore respond to communications emphasizing this aspect of the Newfoundland and Labrador destination.
- Key **motivators** for visiting Newfoundland and Labrador related to both the “scenery/landscape” and the “intrigue of the history of the people and place”. The opportunity to explore the landscape was slightly more frequently mentioned by Maritimers, as was visiting to participate in a specific activity. Ontarians chose each of the motivators to a greater degree than did Maritimers.

7.1.2 Implications

- Key selling points include the scenery/landscape and the people.
- Messaging can be slightly adapted depending upon the geographic market being targeted and should include the people and the type of vacation experience available in some manner.

- Marketing to the United States should reinforce the positioning of Newfoundland and Labrador as a unique and off-the-beaten-track destination as well as the people/culture experience available.
- It is evident that the landscape is a powerful motivator; however given the percentage of Canadians that indicated having heard so much about the place, it is also apparent that the “vacation experience of others” serves as a powerful motivator as well. This indicates that the more people in the domestic, Canadian market know or hear about Newfoundland and Labrador, the more their interest in the destination is piqued. This is thus an issue of awareness but also has implications for advertising messaging. The challenge is to communicate at a more “mass” level, what previous visitors would communicate to a friend.

7.2 Trip Decision-Making

7.2.1 Conclusions

- Vacation/Pleasure visitors seek information on accommodations, attractions, services and facilities and transportation prior to making the decision to visit.
- The planning cycle is about six and one-half to seven months for leisure travelers and increases the greater the distance to be traveled or whether travel is International. The average planning cycle for Vacation/Pleasure travelers is significantly longer than for VFR visitors.

7.2.2 Implications

- There is some flexibility in the timing of media placement and in-market marketing activities – marketing in the Maritimes can be later than marketing in Ontario; while marketing in Western Canada could be slightly before marketing in Ontario.

7.3 Visitors Perceptions

7.3.1 Conclusions

- Vacation/Pleasure visitors mentioned more top-of mind- images than did those visiting friends or relatives. Scenery related images were the most frequently mentioned, followed by tourism product-related images.
- Following their visit, there were many more mentions of the people and emotional-related descriptions suggesting that the scenery and sense of the people lured them here, but when describing the destination, the people and the experience overwhelm the sites and scenery.
- Ad recall is high and is highest among VFR visitors and within the primary markets of Ontario and the Maritimes.
- Newfoundland and Labrador is perceived to offer a different vacation experience than is offered in the Maritimes. For the most part, differences mentioned related to the scenery and the people.

7.3.2 Implications

- Scenery got visitors here but the people and the experience are what impacted them the most.
- Given that Vacation/Pleasure visitors are looking for destinations that offer the people experience and unique and off-the-beaten-track features, the key question is will marketing these attributes increase visitation? The challenge would be to market the diversity and richness of the people and the experience in a way that communicates and adds to the motivator “heard so much about the place, wanted to experience it myself”.

7.4 The Visit Experience

7.4.1 Conclusions

- Visitors like Newfoundland and Labrador and almost 60% said they were likely to return within the next 5 years.
- Visitors were quite satisfied with their trip to the Province – especially Ontarians and Americans.
- The Newfoundland and Labrador vacation experience generally met or exceeded the expectation of all leisure visitors.

7.4.2 Implications

- Marketing efforts to encourage repeat visitation could be explored, with emphasis on the VFR and Maritimes market segments.
- Given the high degree of meeting visitor expectations, the key is to increase the percentage of people for whom the experience **exceeds** expectations. This has implications for continued product development.
- Marketing related to the people/the experience must not end up raising expectations unless the promise can be delivered. This points to possibly adapting a subtle approach to communicate the feeling of the vacation experience.

7.5 Highlights of the Vacation Trip

7.5.1 Conclusions

- In terms of trip highlights, Vacation/Pleasure visitors tend to remember places (attractions/sites) and things they did, more so than mentioning the scenery or the people. Yet first time visitors were relatively more likely to mention scenery. VFR visitors, not surprisingly felt that seeing family/friends were the highlights.

7.5.2 Implications

- It appears that as familiarity with the destination increases, the scenery becomes taken for granted. Recognizing that many leisure visitors (approximately 50%) are repeat visitors, marketing initiatives must address more than the spectacular scenery.

7.6 Areas for Improvement

7.6.1 Conclusion

- Transportation infrastructure is the main area cited for improvement, with some improvements also needed to tourism products and services.
- Cost and transportation are more of an issue for VFR's and Maritimers.

7.6.2 Implications

- There is a need to continue existing efforts to improve ferry services (especially to and from the island and within the province also), air access and to improve/continue road maintenance.

7.7 Attitudes toward Dimensions of the Vacation Experience

7.7.1 Conclusions

- Visitors feel a strong sense of welcome in the Province.
- Visitors do feel that Newfoundland and Labrador culture is different than other places. This sense of difference is strongest among the VFR market; however, still almost one-third of Vacation/Pleasure and almost half (45%) of first time leisure visitors strongly agree with this statement.
- Among visitors the perceived cultural differences in Newfoundland and Labrador relate to differences in the character of the people – from specific personality traits to how the character has been shaped (European influences, influences from the land and its ruggedness and remoteness).

7.7.2 Implications

- Marketing communications should convey this feeling of welcome. Given the desire to meet people and experience the culture identified by vacation/pleasure visitors, this dimension should be considered for enhancing and complimenting existing marketing approaches and materials.

7.8 Competitive Advantages

7.8.1 Conclusions

- By far, compared to other destinations, Newfoundland and Labrador's spectacular natural landscape is our primary competitive advantage followed by our "uniqueness".

- We are perceived to offer value for money, especially to Ontarians, our primary market.
- The weakest areas of those tested, relate to Newfoundland and Labrador “being entertaining and offering lots of activities and things to do”.

7.8.2 Implications

- Current advertising and our “only place” positioning are indeed what leisure visitor’s give us highest marks on and perceive to be our advantages.
- The development of the “weaker” aspects of our destination represents an evolution of the tourism product and as demand warrants should be addressed by the industry.

7.9 Interest in Packages

7.9.1 Conclusions

- There is moderate interest in packages, with slightly more interest among VFR’s and Maritimers.
- Ontarians like the idea of taking tours; Maritimer’s and VFR’s showed more interest in “adventure” packages and VFR’s showed relatively more interest in dinner theatre and local entertainments packages.

7.9.2 Implications

- Package promotions could be piloted in the Maritimes and treated similarly to the in-province resident promotional campaign.
- There seems to be two distinct desires - one to see the destination and another “to do specific things” while at the destination. While not mutually exclusive, it appears that the desire may change as people become, or are, more familiar with the Province. During a visit there is limited time so people prioritize their activities. Thus, depending upon the target market, the type of package offerings could be tailored to these desires.

7.10 Website

7.10.1 Conclusions

- About half of leisure visitors visited the website prior to their visit to the Province.
- For the most part, leisure visitors will visit the Newfoundland and Labrador Tourism website four or five times prior to their visit.
- Interest in Internet newsletters and promotional e-mails was moderate with slightly higher interest among VFR’s and Maritimers. Even one-third of those who had not visited the site expressed an interest in these forms of marketing.

7.10.2 Implications

- Visits to the website can be divided by the average number of visits per person to provide a “rough” measure of the number of people making website inquiries.
- The percentage of leisure visitors checking out the website is similar to the household penetration of personal computers in Canada. This medium must therefore, form part of the marketing strategy. Growth in personal computer usage should be monitored so that the use of Internet in the overall marketing strategy can be adjusted accordingly.
- There is enough interest in Internet newsletters and promotional e-mails marketing to warrant some pilot work in the area. Given that VFR and Maritimers’ interest in these forms of marketing is slightly higher, one of these segments could be the target of such a pilot. The use of these new marketing tools is constantly evolving and it will be important to assess the degree to which they can motivate travel versus becoming solely an informational, “keeping in touch”, tool.

Appendix A: Final Questionnaire



NEWFOUNDLAND AND LABRADOR

NON-RESIDENT VISITOR

FOLLOW-UP SURVEY



Thank you for agreeing to participate in our research project! Completion of this survey should take approximately 15 to 20 minutes, depending upon your responses.

There are three types of questions in this survey. One type requires you to select your response by placing a “✓” or “x” in the box corresponding to your answer. Other questions involve providing a rating from 1 to 10. For these questions, please circle the number that corresponds to your rating. The final type of question requires you to write your answers in the spaces provided.

Please note that the identification label on this questionnaire is for survey administration and quality control purposes only. All individual answers to this survey will be kept strictly confidential in accordance with the provisions of the Freedom of Information Act of the Province of Newfoundland and Labrador. Results will **not** be reported on an individual basis.

When you have completed the questionnaire, please place it in the postage prepaid envelope provided. To return your completed questionnaire to Omnifacts Bristol Research, just drop it in any mailbox. We encourage you to complete the survey as soon as possible. Thank-you!

Please direct any inquiries to:
Omnifacts Bristol Research
139 Water Street
St. John’s, NL
A1C 6E6

e-mail: NewfoundlandandLabradorSurveySupport@bristolgroup.ca
Phone: 1-709-754-2442

1. You have been selected to participate based on having visited Newfoundland and Labrador between June 1 and September 30, 2003. During this period, did you visit the Province more than once?

- Yes 1
- No..... 2 **GO TO QUESTION 3**
- Don’t Know 9 **GO TO QUESTION 3**

2. a. If yes, how many times during this period did you visit? _____

b. For the remainder of this survey, we’d like you to think about the **last** vacation/pleasure trip you took during the period of June to September 2003. In what month was this?

- June 1
- July 2
- August 3
- September 4
- Don’t Know 9

3. For this survey we would like you to think about your last trip to Newfoundland and Labrador between June and September 2003.

SECTION A. DECISION MAKING

To start, we'd like you to answer some questions related to your vacation habits and how you made your decision to take this trip. Please circle the number that corresponds to your rating.

4. The following is a list of statements related to choosing a place to go for a vacation. Please rate these statements using a scale of 1 to 10 where 1 means you **strongly disagree** and 10 means you **strongly agree** with the statement.

| | Strongly Agree | | | | | | | | | | Strongly Disagree |
|--|---------------------------|---|---|---|---|---|---|---|---|----|------------------------------|
| a. I am very interested in vacationing in areas that are considered more unique and off the beaten track. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | |
| b. I like to meet the people and experience the culture of the places that I visit | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | |
| c. A vacation to me is more about the experience I have than just seeing the sites | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | |
| d. I like to take in as many local entertainment events as I can while on vacation. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | |
| e. I like to participate in the culture of a vacation destination rather than observe or read about it..... | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | |

5. The following is a series of statements and we would like you to indicate **which, if any, best describes** what it was about Newfoundland and Labrador that made, or motivated you, to want to visit the Province?

| | |
|---|---|
| a. Newfoundland and Labrador is the only province in Canada that I haven't visited..... | 1 |
| b. I wanted to see icebergs and/or whales..... | 2 |
| c. I wanted to explore the landscape..... | 3 |
| d. The history of the people and place intrigued me..... | 4 |
| e. I wanted to experience a new or different history and culture..... | 5 |
| f. I came to participate in a specific activity..... | 6 |
| g. I've heard so much about the place, I wanted to experience it myself.... | 7 |

IF NONE OF THE ABOVE STATEMENTS BEST DESCRIBES WHAT MOTIVATED YOU TO VISIT, PLEASE INDICATE BELOW WHAT DID MOTIVATE YOU TO WANT TO VISIT THE PROVINCE?

6. What information did you want to know BEFORE YOU MADE YOUR DECISION to come to Newfoundland and Labrador?

None

7a. Within the last two years have you also vacationed and stayed at least two consecutive overnights in any of the Maritime Provinces in Canada – that is Nova Scotia, New Brunswick and/or Prince Edward Island?

Yes 1
No..... 2 **GO TO QUESTION 8**
Don't Know 9 **GO TO QUESTION 8**

7b. Was your vacation experience in the Maritimes different from your vacation experience in Newfoundland and Labrador?

Yes 1
No..... 2 **GO TO QUESTION 8**
Don't Know 9 **GO TO QUESTION 8**

7c. IF YOU ANSWERED YES IN QUESTION 7b – In what way(s) was your vacation experience in the Maritimes different from your vacation experience in Newfoundland and Labrador? (PLEASE BE AS SPECIFIC AS POSSIBLE)

SECTION B. PLANNING

8. Thinking about vacations you have taken over the past few years, would you say the length of time between when you decide WHERE to go and WHEN you actually go has....

- Decreased..... 1
- Remained about the same or 2
- Increased 9

9. Approximately how far in advance of your trip to Newfoundland and Labrador did you actually decide that you were going to visit Newfoundland and Labrador in 2003?

- _____ Days
- _____ Months
- _____ Years

SECTION C: PRIOR PERCEPTIONS AND EXPECTATIONS

10. Prior to your trip to Newfoundland and Labrador, what images, if any, did you have of the Province? **PLEASE BE AS SPECIFIC AS POSSIBLE**

11. Now, based on what you know about Newfoundland and Labrador as a vacation destination, how would you describe it to a friend or relative?

12a. How likely are you to visit Newfoundland and Labrador on vacation again within the next 5 years? Are you....

- Very Likely 1 **GO TO QUESTION 12b**
- Somewhat likely..... 2 **GO TO QUESTION 12b**
- Not very likely 3 **GO TO QUESTION 12c**
- Not at all likely..... 4 **GO TO QUESTION 12c**
- Don't Know 9 **GO TO QUESTION 13**

12b. IF VERY OR SOMEWHAT LIKELY, Why do you plan to return?

12c. IF NOT VERY OR NOT AT ALL LIKELY, Why are you not likely to return?

13a. Prior to your visit, do you recall seeing, hearing or reading any advertising for Newfoundland and Labrador?

- Yes 1
No..... 2 **GO TO QUESTION 14a**
Don't Know 9 **GO TO QUESTION 14a**

13b. IF Yes, what do you recall? (Please be as specific as possible, we are looking for specific content of the advertising and name of publications and not the general type of advertising, i.e. newspaper, magazine, TV)

SECTION D: ACTUAL VISIT EXPERIENCE

The next series of questions are related to your actual trip.

14a. Overall, how satisfied were you with your trip to Newfoundland and Labrador? Please use a scale of 1 to 10 where 1 means not at all satisfied and 10 means completely satisfied.

| | | | | | | | | | | |
|-----------------------------|---|---|---|---|---|---|-----------------------------|---|----|--|
| Not at all Satisfied | | | | | | | Completely Satisfied | | | |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | |

14b. Why did you give that rating?

15. Overall, did your trip meet, exceed or not meet your expectations?

- Did not Meet Expectations..... 1
- Met expectations 2
- Exceeded expectations 3

16. What was the highlight of your trip?

17. What, if anything, were you least impressed with?

18. Now, please think about your vacation experience in Newfoundland and Labrador this past summer and circle the number that indicates your level of agreement with the following statements...

Strongly Disagree

Strongly Agree

a. People treated me like family ...1 2 3 4 5 6 7 8 9 10

b. Culture in Newfoundland and Labrador is different than other places

1 2 3 4 5 6

7 8 9 10

GO TO QUESTION 18c.

CONTINUE

If you provided a rating of 7 or higher in Question 18b, “*Culture in Newfoundland and Labrador is different than other places*”, please indicate in what way(s) the culture is different from other places.

c. I felt welcomed in the Province

1 2 3 4 5 6 7 8 9 10

19. The following is a list of various aspects of an overall vacation experience; we’d like you to compare Newfoundland and Labrador to other vacation destinations you have visited in the last 5 years. Please use a scale of 1 to 10 where **1** means Newfoundland and Labrador is **worse than all other destinations** you have

visited and **10** means Newfoundland and Labrador is **better than all other destinations** you have visited. Remember to think about vacations within the last 5 years.

How would you rate your visit to Newfoundland and Labrador compared to other vacations in terms of...

| | Worse Than All | | | | | | | | | Better Than All |
|---|---------------------------|---|---|---|---|---|---|---|---|----------------------------|
| a. Overall Satisfaction | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| b. Being worth the money spent..... | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| c. Being unique | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| d. Being fun | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| e. Being entertaining | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| g. Offering spectacular natural landscape | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| h. Offering lots of activities and things to do | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

20. If there were two things (other than weather) that could have been done to improve the experience on your trip, what would they be?

1.

2.

SECTION F. ACTIVITIES/SITES VISITED

21. You indicated during the traveler survey conducted with you this summer that you **VISITED VARIOUS HISTORIC SITES, MUSEUMS AND HERITAGE INTERPRETATION CENTRES**. Thinking about your visit and experience at these places, in general, how would you rate your satisfaction with each of the following? Please use a scale of 1 to 10 where 1 is not at all satisfied and 10 is completely satisfied.

| | Not at all Satisfied | | | | | Completely Satisfied | | | | |
|---|-----------------------------|---|---|---|---|-----------------------------|---|---|---|----|
| a. Availability of information, directions, and appropriate signage | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| b. Convenient hours of operation.. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

- c. Availability/quality of programming/interpretation1 2 3 4 5 6 7 8 9 10
- d. Quality/level of customer service.....1 2 3 4 5 6 7 8 9 10
- e. Value for money1 2 3 4 5 6 7 8 9 10
- f. Overall quality of the experience1 2 3 4 5 6 7 8 9 10

22a. Were there any **historic sites, museums or heritage interpretation centres** you were hoping to see or participate in that were not available?

- Yes 1
- No..... 2 **GO TO QUESTION 23**
- Don't Know 9 **GO TO QUESTION 23**

22b. IF Yes, what were they?

23. You indicated during the traveler survey conducted with you this summer that you visited or participated in **VARIOUS SIGHTSEEING TOURS AND NATURAL ATTRACTIONS**

Using a scale of 1 to 10 where 1 is not at all satisfied and 10 is completely satisfied, in general, how would you rate your satisfaction with the following.

Not at all Satisfied

Completely Satisfied

- a. Availability of information, directions, and appropriate signage1 2 3 4 5 6 7 8 9 10
- b. Convenient hours of operation....1 2 3 4 5 6 7 8 9 10
- c. Availability/quality of programming/interpretation1 2 3 4 5 6 7 8 9 10
- d. Quality/level of customer service.....1 2 3 4 5 6 7 8 9 10
- e. Value for money1 2 3 4 5 6 7 8 9 10
- f. Overall quality of the experience1 2 3 4 5 6 7 8 9 10

24a. Were there any **sightseeing tours and natural attractions** you were hoping to see or participate in that were not available?

- Yes 1
- No..... 2 **GO TO QUESTION 25**
- Don't Know 9 **GO TO QUESTION 25**

24b. IF Yes, what were they?

25. During your visit, how interested would you have been in purchasing packages of planned activities/itineraries had they been available? Would you say you were...

- Very interested 1 **GO TO QUESTION 26**
- Somewhat interested 2 **GO TO QUESTION 26**
- Not very interested or 3 **GO TO QUESTION 27**
- Not at all interested 4 **GO TO QUESTION 27**
- Don't Know 9 **GO TO QUESTION 27**

26. Please rate your level of interest in the following type of packages:

| | Not at all Interested | Not Very Interested | Somewhat Interested | Very Interested |
|---|----------------------------------|--------------------------------|--------------------------------|----------------------------|
| a. Scenic rural or coastal tour package..... | 1 | 2 | 3 | 4 |
| b. Historical/cultural tour package..... | 1 | 2 | 3 | 4 |
| c. City tour package..... | 1 | 2 | 3 | 4 |
| d. Adventure package..... | 1 | 2 | 3 | 4 |
| e. Educational tour package..... | 1 | 2 | 3 | 4 |
| f. Motorcoach touring package..... | 1 | 2 | 3 | 4 |
| g. Dinner Theatre and local entertainment package..... | 1 | 2 | 3 | 4 |

SECTION G: PRODUCT DEVELOPMENT SECTION

27. When taking a vacation trip like the one you took to Newfoundland and Labrador, what type of accommodations do you **prefer** to stay in?
- a. Hotels01
 - b. Motels02
 - c. Bed & Breakfast.....03
 - d. Country Inn04
 - e. Resort05
 - f. Hunting and/or fishing lodge.....06
 - g. Commercial cottage or cabin07
 - h. Private cottage or vacation home08
 - i. Home of friends or relatives09
 - j. National or provincial park campground10
 - k. Privately operated campgrounds/trailer parks11
 - Don't Know99
 - Other (please specify) _____

If you prefer Hotels, Motels, Bed & Breakfasts, Country Inns, Resorts or Commercial Cottages or Cabins, please continue. If your preferred type of accommodations does not include any of these, please go to Question 33.

28. What quality of property or accommodation do you seek when taking a vacation trip like the one you took to Newfoundland and Labrador? Would you say you generally seek....
- First class or superior quality accommodations/ 4 or 5-Star properties.....1
 - Mid quality accommodations/3 star properties, or2
 - Basic accommodations/2-star/2 ½ star properties3

- 29a. Generally speaking, were you able to find and stay in your preferred type of accommodations in the **ST. JOHN'S** area when planning the trip to Newfoundland and Labrador?
- Yes1 **GO TO Q30A**
 - No.....2 **CONTINUE**
 - Did not seek accommodations in St. John's area.....3 **GO TO Q30A**
 - Accommodations pre-arranged as part of tour/package4 **GO TO Q30A**

- 29b. **IF NO**, Was this....
- Due to a problem getting reservations, or1
 - Due to the fact that the type of accommodation you were looking for did not exist in the area?.....2

30a. Generally speaking, were you able to find and stay in your preferred type of accommodations in **OTHER AREAS of the province** when planning the trip to Newfoundland and Labrador?

- Yes₁ **GO TO Q31**
 No.....₂ **CONTINUE**
 Did not seek accommodations in OTHER areas of the Province ₃ **GO TO Q31**
 Accommodations pre-arranged as part of tour/package₄ **GO TO Q31**

30b. IF your response to QUESTION 30a. was NO – please indicate below in what other area or areas of Newfoundland and Labrador you were unable to stay in your preferred type of accommodations? Please write the name of the community or area of Newfoundland and Labrador in the space provided. For each location listed, please also answer Question 30c.

| Area(s) of Newfoundland and Labrador | 30c. Was this ... |
|--------------------------------------|---|
| 1. _____ | Due to a problem getting reservations..... ₁ or Due to the fact that the type of accommodation you were looking for did not exist in the area?..... ₂ |
| 2. _____ | Due to a problem getting reservations..... ₁ or Due to the fact that the type of accommodation you were looking for did not exist in the area?..... ₂ |
| 3. _____ | Due to a problem getting reservations..... ₁ or Due to the fact that the type of accommodation you were looking for did not exist in the area?..... ₂ |

| | |
|----------|---|
| 4. _____ | Due to a problem getting reservations.....1 or Due to the fact that the type of accommodation you were looking for did not exist in the area?2 |
| 5. _____ | Due to a problem getting reservations.....1 or Due to the fact that the type of accommodation you were looking for did not exist in the area?2 |

31. Please turn your survey to answer the series of questions on the next page

31. The following series of questions includes a list of various services or general aspects associated with accommodation facilities. For each aspect, please indicate two things – First rate the item in terms of its importance to you personally. Use a scale of 1 to 10 where 1 means that the item is "not at all important" TO YOU PERSONALLY and 10 means it is "extremely important" TO YOU PERSONALLY.

Then, following this rating of importance, we want you to rate the degree to which your accommodations in Newfoundland and Labrador met or did not meet your expectations. For this rating, please use a scale of 1 to 10, where 1 means the accommodations “DID NOT meet your expectations at all” and 10 means they “Exceeded your expectations”. Please consider a score of 5 to represent “just meeting your expectations”.

If you stayed in more than one place of accommodation and had differing assessments on the degree to which your accommodations met your expectations, please provide us with a range using the same 10-point scale.

| Aspect of Accommodations | 31a. How important is it that... | | 31b. To what degree did your accommodations in Newfoundland and Labrador meet or not meet your expectations in terms of... | | 31c. Variation in accommodation range in terms of.... | |
|---|----------------------------------|---------------------|--|----------------------------|---|-------------------|
| | Not at all important | Extremely important | DID NOT meet your expectations | Exceeded your expectations | Low end of range | High end of range |
| a. Property has a dining room or provides dinner..... | 1 2 3 4 5 6 7 8 9 10 | | 1 2 3 4 5 6 7 8 9 10 | | _____ | to _____ |
| b. Guest rooms are clean and well maintained..... | 1 2 3 4 5 6 7 8 9 10 | | 1 2 3 4 5 6 7 8 9 10 | | _____ | to _____ |
| c. Overall, the exterior of the property is attractive and pleasant to look at..... | 1 2 3 4 5 6 7 8 9 10 | | 1 2 3 4 5 6 7 8 9 10 | | _____ | to _____ |
| d. Staff conduct themselves in a professional manner at all times..... | 1 2 3 4 5 6 7 8 9 10 | | 1 2 3 4 5 6 7 8 9 10 | | _____ | to _____ |

| Aspect of Accommodations | 31a. How important is it that... | | 31b. To what degree did your accommodations in Newfoundland and Labrador meet or not meet your expectations in terms of... | | 31c. Variation in accommodation range in terms of.... | |
|---|----------------------------------|---------------------|--|----------------------------|---|-------------------|
| | Not at all important | Extremely important | DID NOT meet your expectations | Exceeded your expectations | Low end of range | High end of range |
| e. Staff is always friendly and courteous..... | 1 2 3 4 5 6 7 8 9 10 | | 1 2 3 4 5 6 7 8 9 10 | | _____ | to _____ |
| f. Rooms are of a comfortable size..... | 1 2 3 4 5 6 7 8 9 10 | | 1 2 3 4 5 6 7 8 9 10 | | _____ | to _____ |
| g. Beds are of an appropriate type (e.g. queen, king, twins) and comfort..... | 1 2 3 4 5 6 7 8 9 10 | | 1 2 3 4 5 6 7 8 9 10 | | _____ | to _____ |
| h. Bathrooms are of a reasonable size with good quality fixtures and amenities..... | 1 2 3 4 5 6 7 8 9 10 | | 1 2 3 4 5 6 7 8 9 10 | | _____ | to _____ |
| i. Quality of soundproofing..... | 1 2 3 4 5 6 7 8 9 10 | | 1 2 3 4 5 6 7 8 9 10 | | _____ | to _____ |

32. The following is a list of general elements about the accommodations you stayed in while in Newfoundland and Labrador. Please rate each on a scale of 1 to 10 where 1 means you were not at all satisfied and 10 means you were extremely satisfied with the element of your accommodations.

| | Not at all Satisfied | | | | | Extremely Satisfied | | | | |
|---|-----------------------------|---|---|---|---|----------------------------|---|---|---|----|
| a. Availability of services and facilities..... | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| b. Quality of facilities..... | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| c. Overall Quality of the Service..... | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| e. Overall experience..... | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| f. Overall Value for money..... | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

33. During your visit to Newfoundland and Labrador, did you or anyone in your party visit a Visitor Information Centre?

- Yes 1 **CONTINUE**
- No..... 1 **GO TO QUESTION 38**
- Don't Know 9 **GO TO QUESTION 38**

34. What information did you request?

35. Did you receive the information you were looking for?

- Yes 1
- No..... 2
- Don't Know 9

36. Overall, how satisfied were you with the service you received at the Visitor Information Centres? Were you ...

- Very satisfied5
- Satisfied.....4
- Neither satisfied/dissatisfied3
- Dissatisfied.....2
- Very dissatisfied.....1

37. How satisfied were you with the knowledge of the staff? Were you ...

- Very satisfied5
- Satisfied.....4
- Neither satisfied/dissatisfied3
- Dissatisfied.....2
- Very dissatisfied.....1

SECTION H. MEDIA

38. Have you ever visited the Tourism Newfoundland and Labrador web site? (www.gov.nl.ca/tourism) If so, when?

- Yes, Sometime in 20031 **CONTINUE**
- Yes, Prior to 20032 **CONTINUE**
- Have not visited this web site9 **GO TO QUESTION 42**

39. What type of information were you looking for on the Tourism Newfoundland and Labrador website? (www.gov.nl.ca/tourism)

40. What information, if any, were you looking for but UNABLE to find on the website? (www.gov.nl.ca/tourism)

41. From the time you were considering taking a vacation trip to Newfoundland and Labrador and **PRIOR** to taking this trip, how often did you visit the Tourism Newfoundland and Labrador website? (www.gov.nl.ca/tourism)

RECORD NUMBER OF TIMES: _____
Don't Know9999

42. How interested would you be in receiving Web newsletters or promotional e-mails related to travel to or within Newfoundland and Labrador? Would you be...

- Very interested4
- Somewhat interested3
- Not that interested or.....2
- Not at all interested1

Appendix B:
Comparison Of Survey Population And Completed Sample

Table 1: Age Comparison

| | | Total Population Willing | | Total Completed Sample | |
|---------------|----------------|--------------------------|--------|------------------------|--------|
| | | N | % | n | % |
| Collapsed AGE | 1 18 to 44 | 572 | 32.0% | 259 | 28.3% |
| | 2 45 to 64 | 918 | 51.3% | 486 | 53.1% |
| | 3 65 and older | 300 | 16.8% | 170 | 18.6% |
| Total | | 1790 | 100.0% | 915 | 100.0% |

Table 2: Household Income Comparison

| | | Total Population Willing | | Total Completed Sample | |
|--------------|------------------------|--------------------------|--------|------------------------|--------|
| | | N | % | n | % |
| INCOME | 1 Less than \$40,000 | 219 | 12.2% | 96 | 10.4% |
| | 2 \$40,000 to \$69,999 | 567 | 31.6% | 318 | 34.5% |
| | 3 \$70,000 to \$99,999 | 481 | 26.8% | 258 | 28.0% |
| | 4 \$100,000 or more | 526 | 29.3% | 249 | 27.0% |
| Total | | 1793 | 100.0% | 921 | 100.0% |

Table 3: Education Comparison

| | | Total Population Willing | | Total Completed Sample | |
|--------------|--|--------------------------|--------|------------------------|--------|
| | | N | % | n | % |
| EDUCATION | 1 Less than High School | 37 | 1.9% | 17 | 1.7% |
| | 2 Graduated High School | 243 | 12.4% | 123 | 12.2% |
| | 3 Some Community/Technical College/Cégep | 130 | 6.6% | 65 | 6.5% |
| | 4 Graduated Community/Technical College/Cégep | 358 | 18.3% | 186 | 18.5% |
| | 5 Some University | 161 | 8.2% | 79 | 7.9% |
| | 6 Graduated University - one or more bachelor degrees | 597 | 30.4% | 306 | 30.4% |
| | 7 Post Graduate - Masters degree, PHD or post-doctoral fellows | 435 | 22.2% | 230 | 22.9% |
| Total | | 1961 | 100.0% | 1006 | 100.0% |

Appendix C: Information Desired Prior to Visit

Q6. What information did you want to know BEFORE YOU MADE YOUR DECISION to come to Newfoundland and Labrador?

*****SUBPOPULATION: Respondents who said their main purpose for visiting NL was for vacation/ pleasure trip**

| | Leisure Visitors |
|---|-------------------|
| | Vacation Pleasure |
| Total (N) | 709 |
| Did not require any information | 27.6% |
| Transportation Questions | 16.2% |
| Accommodation Questions | 15.4% |
| Questions About Attractions | 15.4% |
| General questions about accommodations | 10.9% |
| General Information Questions | 8.9% |
| Campground/ park information | 8.6% |
| Ferry schedule/ service | 7.8% |
| Cost Questions | 6.6% |
| Map information | 5.8% |
| Questions about attractions/ services/ facilities | 5.6% |
| Outdoor/ Scenery Questions | 5.4% |
| Don't know/ Not sure | 4.5% |
| General tourist information | 4.4% |
| Weather / climate | 4.2% |
| General travel/ transportation questions | 3.1% |
| Cost to travel by ferry | 2.5% |
| Access routes to the province | 2.4% |
| Bed and breakfasts | 2.4% |
| List of activities | 2.1% |
| Special events | 2.1% |
| Historical sites (i.e.vikings) | 2.0% |
| Road/ highway conditions | 1.8% |
| Road/ highway routes | 1.8% |

NOTE: Percentages may exceed 100% due to multiple responses

Q6. What information did you want to know BEFORE YOU MADE YOUR DECISION to come to Newfoundland and Labrador? (Continued...)

*****SUBPOPULATION: Respondents who said their main purpose for visiting NL was for vacation/ pleasure trip**

| | Leisure Visitors |
|----------------------------------|-------------------|
| | Vacation Pleasure |
| Hiking trails | 1.7% |
| Festivals | 1.6% |
| Must see list of attractions | 1.3% |
| Iceberg tours | 1.3% |
| Distances between areas/ sites | 1.1% |
| National park attractions | 1.0% |
| Gros Morne | .8% |
| Landscape/ scenery | .8% |
| Rental cars | .7% |
| General costs/ rates | .7% |
| Whale tours | .7% |
| General tour information | .7% |
| Wildlife | .7% |
| Travel time to reach province | .6% |
| General layout of island | .6% |
| Cost of entire trip | .6% |
| Local entertainment | .6% |
| Local culture | .6% |
| Motorhome/ RV facilities offered | .4% |
| Cost to reach province | .4% |
| Airfares | .4% |
| Camping costs | .4% |
| Food/ cuisine | .4% |
| Cabin space on the ferry | .3% |
| Booking accommodations | .3% |

NOTE: Percentages may exceed 100% due to multiple responses

**Q6. What information did you want to know BEFORE YOU MADE YOUR
DECISION to come to Newfoundland and Labrador? (Continued...)
***SUBPOPULATION: Respondents who said their main purpose
for visiting NL was for vacation/ pleasure trip**

| | Leisure Visitors |
|---------------------------------|-------------------|
| | Vacation Pleasure |
| Hotels/ motels | .3% |
| Cabins | .3% |
| Accommodations costs | .3% |
| Plays | .3% |
| L' Anse Aux Meadows | .3% |
| Natural attractions | .3% |
| Restaurants | .3% |
| Times for tours (i.e. boat) | .3% |
| How to obtain fishing license | .3% |
| Towns/ communities | .3% |
| Best places for fishing | .3% |
| Where to watch salmon run | .3% |
| Best time of year to go there | .3% |
| Ferry bookings | .1% |
| Airline schedule | .1% |
| Round trip possibilities | .1% |
| Airport location | .1% |
| Accommodations that allow pets | .1% |
| Facilities at campgrounds | .1% |
| Cost of tours | .1% |
| Hotel/ motel costs | .1% |
| Costs for activities | .1% |
| Costs for children's activities | .1% |
| Park fees | .1% |
| Bed and breakfast rates | .1% |

NOTE: Percentages may exceed 100% due to multiple responses

**Q6. What information did you want to know BEFORE YOU MADE YOUR
DECISION to come to Newfoundland and Labrador? (Continued...)
***SUBPOPULATION: Respondents who said their main purpose
for visiting NL was for vacation/ pleasure trip**

| | Leisure Visitors |
|---|-------------------|
| | Vacation Pleasure |
| Car rental rates | .1% |
| Available RV services (i.e. repairs, parts) | .1% |
| Dinner theatres | .1% |
| Sites in Labrador | .1% |
| Lighthouses | .1% |
| Wheelchair access to attractions | .1% |
| Canoeing | .1% |
| Outfitter information | .1% |
| Bird watching details | .1% |
| Tee off times at golf courses | .1% |
| Family oriented areas | .1% |
| Terrain | .1% |
| Geology | .1% |
| Geography | .1% |
| Time we should allocate for our stay | .1% |
| Population | .1% |
| Fogo Island | .1% |
| Regulations for fishing (i.e. salmon, fly) | .1% |
| Pictures of various areas | .1% |
| Where to meet people | .1% |
| Time zone differences | .1% |
| The Grenfel Mission | .1% |
| If friends would be home during our visit | .1% |
| Other Questions | .1% |

NOTE: Percentages may exceed 100% due to multiple responses

Appendix D: Image and Description Comments by Category

Q10. Prior to your trip to Newfoundland and Labrador, what images, if any, did you have of the Province?

*****SUBPOPULATION: First Time Visitors**

| | Total |
|--|--------------|
| Total (N) | 525 |
| SCENERY DESCRIPTIONS | |
| Water/ ocean | 4.8% |
| Nice/ beautiful | 8.2% |
| Scenery/ coastline/ landscape/ natural attractions | 23.2% |
| Quaint/ small towns/ villages | 6.1% |
| Cold/ weather | 2.5% |
| Isolated/ remote | 2.9% |
| Rocks | 1.5% |
| Big/ vast spaces | 1.0% |
| Enjoy the cool weather | 0.2% |
| High cliffs | 0.2% |
| Colorful houses | 0.6% |
| Ever changing weather | 0.2% |
| Wet/ windy weather | 0.6% |
| Rugged | 1.7% |
| Mountains | 1.1% |
| Similar to Cape Breton | 0.2% |
| Trees | 0.4% |
| Frost | 0.2% |
| Unique /Distinct (Not specific) | 0.2% |
| PEOPLE | |
| Friendly people | 16.0% |
| Distinctive local faces (i.e. friendly, rugged) | 0.4% |
| Accents/ speech differences | 0.8% |
| Hospitable people | 0.4% |
| Low crime rate | 0.2% |
| Fewer people/ less crowded | 1.0% |
| TOURISM | |
| Nature/ wilderness/ wildlife | 9.1% |
| History - British | 0.8% |
| Vikings | 0.8% |
| Cultural images (not specific) | 0.6% |
| Local cuisine | 1.7% |
| Railroad | 0.2% |
| Enjoyable music (i.e. distinctive) | 1.3% |
| Fishing boats | 0.2% |
| Very diverse | 0.6% |

| | |
|---|-------|
| Whales | 2.5% |
| Birds (i.e. puffins) | 0.6% |
| Icebergs | 3.0% |
| Bars/ downtown (i.e. George Street) | 0.4% |
| Irish traditional music | 0.2% |
| Good hiking/ walking | 0.6% |
| Tourism is their new industry focus | 0.2% |
| Outdoor activities | 0.2% |
| Fishing | 1.9% |
| Valley shown in commercial | 0.2% |
| Gros Morne mention | 1.0% |
| Moose | 0.4% |
| Historical | 0.2% |
| Unspoiled /Not commercialized | 0.4% |
| Lots to see and do | 0.4% |
| Slower pace of life | 0.4% |
| | |
| EMOTIONAL | |
| Memories of my family | 0.8% |
| Knew it was a different than our home province | 0.6% |
| Fun times ahead | 0.6% |
| Home | 0.6% |
| Thought cities would be larger | 0.2% |
| Relaxing /Peaceful | 0.4% |
| | |
| NEGATIVE | |
| Poor/ economically depressed | 1.0% |
| Lack of bathroom plumbing (i.e. outhouse) | 0.2% |
| Lack of trees | 0.2% |
| Snow | 0.4% |
| Minimal agriculture | 0.2% |
| Not much to see or do | 0.2% |
| Barren | 0.6% |
| | |
| OTHER | |
| St. John's mention | 1.0% |
| Fishing is over as an occupation | 0.2% |
| A small province | 0.2% |
| | |
| Knew what to expect/ previous knowledge of province | 22.3% |
| | |
| Refused | 0.2% |
| Don't know/ Not sure | 34.9% |

NOTE: Percentages may exceed 100% due to multiple responses

Q11. Now, based on what you know about Newfoundland and Labrador as a vacation destination, how would you describe it to a friend or relative?

*****SUBPOPULATION: First Time Visitors**

| | Total |
|---|--------------|
| Total (N) | 525 |
| SCENERY DESCRIPTIONS | |
| Have to see it to believe it | 0.6% |
| Beautiful scenery/ landscape | 14.7% |
| Water/ ocean/ sea | 0.4% |
| Trees | 0.2% |
| Each community has distinct character | 0.2% |
| Rustic | 0.6% |
| Fabulous scenery | 0.2% |
| Rugged | 1.3% |
| Wild beauty | 0.2% |
| Scenic | 2.5% |
| Gorgeous coastline | 0.4% |
| Magnificent scenery | 0.2% |
| Similar to Cape Breton | 0.2% |
| Rocks | 0.2% |
| Looks like Ireland | 0.2% |
| Remote/ isolated | 0.6% |
| Vast | 0.6% |
| Like the fog | 0.2% |
| Unique scenery/ landscape | 0.6% |
| | |
| Scenery Descriptions | 34.3% |
| | |
| PEOPLE DESCRIPTIONS | |
| People are friendly | 9.1% |
| People are helpful/ go out of their way | 0.6% |
| People are nice | 1.3% |
| People are not in a rush/ easy going | 0.4% |
| People enjoy their lives | 0.2% |
| People are unique | 0.4% |
| People are great | 2.7% |
| People are outgoing | 0.2% |
| Fantastic culture | 0.4% |
| People are wonderful | 0.4% |
| Accommodating to visitors/ hospitable | 1.7% |
| People are polite/ considerate | 0.4% |
| People are very open | 0.2% |
| People have a great sense of humour | 0.2% |
| Different culture/ history | 1.1% |
| | |

| | |
|--|-------|
| People Descriptions | 30.7% |
| TOURISM DESCRIPTIONS | |
| Worth the trip to see it | 1.1% |
| Have to return to appreciate it | 0.2% |
| Whale watching | 0.4% |
| Bird watching (i.e. Puffins) | 0.2% |
| One of the top Canadian destinations | 0.2% |
| Gros Morne Park | 1.5% |
| Need more time to see everything | 0.4% |
| Hidden treasure of Canada | 0.4% |
| Good place for a vacation | 3.4% |
| Great for camping | 0.8% |
| Lots to see and do | 2.1% |
| Good bed and breakfasts | 0.4% |
| Many natural attractions | 0.2% |
| Number one place to visit | 0.4% |
| L' Anse Aux Meadows | 0.4% |
| Good boat trips | 0.2% |
| Fantastic music | 0.2% |
| Reasonable prices/ rates | 0.4% |
| Good food/ cuisine | 0.2% |
| Fjord viewing | 0.2% |
| Historical sites (i.e. Vikings) | 0.8% |
| Great nightlife (i.e. George Street) | 0.2% |
| Attractions for smaller children | 0.2% |
| Wildlife | 0.2% |
| Good hiking | 0.2% |
| Geo Centre | 0.2% |
| Theatre plays | 0.2% |
| Tourist friendly | 0.2% |
| Lots of outdoor activities | 0.4% |
| Not over commercialized | 0.4% |
| Good accommodations | 0.6% |
| Urban/ rural areas close to each other | 0.2% |
| Good places for shopping | 0.4% |
| Top notch parks (i.e. clean) | 0.2% |
| Clean air | 0.2% |
| Tourism Activities Descriptions | 19.4% |
| EMOTIONAL DESCRIPTIONS | |
| Awesome | 1.1% |
| Unique experience | 5.0% |
| Most wonderful place in the world | 0.2% |
| Amazing | 0.4% |
| Wonderful (in general) | 1.9% |
| Untouched/ unspoiled | 1.0% |
| Adventuresome | 0.2% |

| | |
|--|--------------|
| Much improved since last visit | 0.2% |
| It is THE place to go | 1.9% |
| A must see/ do not miss | 8.0% |
| Fun | 0.4% |
| Fabulous place | 5.7% |
| Very of-the-Atlantic | 0.2% |
| A place for everyone | 0.2% |
| Charming | 0.2% |
| Interesting | 0.4% |
| Fell in love with the place | 0.2% |
| It felt like home | 0.2% |
| A world unto itself | 0.2% |
| Fantastic | 0.2% |
| Unbelievable | 0.2% |
| I miss being there | 0.4% |
| Incredible | 0.4% |
| Outstanding | 0.2% |
| Majestic | 0.2% |
| Very enjoyable | 0.2% |
| | |
| Positive Descriptions | 28.2% |
| | |
| NEGATIVE DESCRIPTIONS | |
| Bad experience on Labrador ferry | 0.2% |
| Rough seas while on Labrador ferry | 0.2% |
| Charged for dinner while on Labrador ferry | 0.2% |
| Expensive place to travel to | 0.4% |
| No promotion/ no one knows much about it | 0.6% |
| Dislike ferry trip in general | 0.2% |
| Difficult place to get to | 0.4% |
| Limited access means limited visitors | 0.2% |
| Sites not family friendly | 0.2% |
| Rude customer service (i.e. restaurants) | 0.2% |
| Not all areas tourism friendly | 0.2% |
| Rough roads/ highways | 0.2% |
| | |
| Negative Descriptions | 1.9% |
| | |
| OTHER DESCRIPTIONS | |
| Like a step back in time | 0.4% |
| Not the same pace/ pressure | 0.8% |
| Trying to arrange business meetings here | 0.4% |
| Able to travel anywhere from the highway | 0.2% |
| Good weather | 1.0% |
| A place to relax | 1.7% |
| Educational/ learn a lot while there | 0.4% |
| Diverse place | 0.2% |
| Ever changing weather | 0.2% |
| Safe place to visit | 0.2% |

| | |
|--|------|
| Not crowded | 0.4% |
| Roads/ highways in good condition | 0.2% |
| Great place when weather cooperates | 0.4% |
| Place to retire/ grow old | 0.2% |
| Would like to live there | 0.2% |
| Easy place to travel to | 0.2% |
| Do not travel after dark | 0.2% |
| Improved highways (i.e. passing lanes) | 0.2% |
| Diverse ecosystem | 0.2% |
| Easy access to ecosystem | 0.2% |
| Born here/ trip here is coming home | 0.2% |
| Visitors always have positive things to say | 0.2% |
| | |
| Other Descriptions | 9.0% |
| | |
| Don't know/ Not sure | 1.5% |

NOTE: Percentages may exceed 100% due to multiple responses

Appendix E: Comments on the Comparison with the Maritimes

Q7C. In what way(s) was it different?

*****SUBPOPULATION: Respondents who stayed at least two consecutive overnights in any of the Maritime Provinces and said their vacation experience in the Maritimes was different from their vacation experience in NL**

| | Total |
|--|--------------|
| Total (N) | 358 |
| SCENERY/OUTDOORS/DIFFERENCES | |
| Different weather/ climate in NL | 0.8% |
| Different geography/ terrain in NL | 1.7% |
| Colder in NL | 0.6% |
| Lack of trees in NL | 0.3% |
| NL looks like Ireland | 0.3% |
| Houses perched right on knolls in NL | 0.3% |
| Maritimes had beaches | 0.3% |
| Unique scenery in NL/ more interesting | 5.6% |
| Sites are further apart in NL | 1.1% |
| Rugged scenery in NL | 2.8% |
| Only NL has places like Table Lands | 0.3% |
| Watch moose while driving highway | 0.3% |
| NL wild/ untouched/ primitive | 1.7% |
| NL remote/ isolated | 3.1% |
| NL rocky | 0.3% |
| Different landscape in NL | 3.4% |
| NL windy | 0.3% |
| NL quaint/ charming | 0.6% |
| NL quiet | 0.3% |
| Better scenery in Maritimes | 0.3% |
| NL had older trees | 0.3% |
| NL does not have quality soil | 0.3% |
| NL is frontier like | 0.3% |
| NL has natural attractions | 0.6% |
| NL has beautiful scenery | 1.4% |
| NL had better weather | 0.6% |
| NL more natural looking | 0.6% |
| NL has the best view of the ocean | 0.3% |
| NL has vast areas/ a lot of space | 0.3% |
| | |
| Scenery Differences | 27.9% |
| | |
| PEOPLE/CULTURE DIFFERENCES | |
| NL people are very friendly | 9.5% |
| People are unique/ different | 4.5% |
| People invited us to stay in their homes | 0.6% |

| | |
|---|--------------|
| People are nice/ wonderful etc. | 0.8% |
| NL has unique history/ culture | 3.9% |
| NL people very helpful | 1.4% |
| NL very open in conversation | 2.0% |
| NL people are more hearty | 0.6% |
| NL people are more hospitable | 1.1% |
| Comforting culture in NL | 0.3% |
| See people in NL living their daily routine | 0.3% |
| NL people are happy/ content | 0.6% |
| People have a laid back manner in NL | 0.6% |
| NL have different accents/ dialects | 0.3% |
| Different customs in NL | 0.3% |
| People are warmer in NL | 0.6% |
| NL people are not judgmental | 0.3% |
| NL don't want tourists just for their money | 0.3% |
| NL people outgoing | 0.3% |
| NL has very proud people | 0.3% |
| | |
| People/ Culture Differences | 25.4% |
| | |
| INFRASTRUCTURE DIFFERENCES | |
| NL not as commercialized | 1.4% |
| No traffic jams in NL | 0.6% |
| Maritimes better set up for tourism | 0.6% |
| Better roads in Maritimes | 0.6% |
| NL composed of small villages | 0.8% |
| Less crowded in NL/ lower population | 0.8% |
| Not enough accommodations in NL | 0.3% |
| Maritimes too urban | 0.3% |
| Villages in NL are more primitive | 0.3% |
| Less tourist traps in NL | 0.3% |
| NL is less traveled | 0.3% |
| Not as easy to access NL | 0.3% |
| Not as many places to shop in NL | 0.3% |
| | |
| Infrastructure Differences | 16.2% |
| | |
| TOURISM ACTIVITIES DIFFERENCES | |
| NL has L' Anse Aux Meadows | 0.3% |
| Whale tours in NL | 0.6% |
| Fjord trips available in NL | 0.3% |
| Gros Morne Park | 0.3% |
| Maritimes had music festivals | 0.3% |
| Enjoyed travel on NL ferry | 0.6% |
| NL was more interesting (not specific) | 1.7% |
| Stayed in cottages while in NL | 0.3% |
| Get to make your own meals in NL | 0.3% |
| Unique cuisine in NL (i.e. moose soup) | 0.6% |

| | |
|--|-------|
| NL has insectarium | 0.3% |
| Able to fish in NL | 0.6% |
| Better food in Maritimes | 0.3% |
| NL is tourism friendly | 0.3% |
| Quality bed and breakfast locations | 0.3% |
| Good food in NL | 0.3% |
| Iceberg tours in NL | 0.6% |
| More hiking in NL | 0.3% |
| NL more exciting | 0.3% |
| NL national campgrounds well maintained | 0.3% |
| NL provincial parks not well maintained | 0.3% |
| Things more expensive in the Maritimes | 0.3% |
| Lots of things to see in NL | 0.3% |
| More heritage sites in NL | 0.3% |
| | |
| Tourism/ Activities Differences | 19.3% |
| | |
| OTHER DIFFERENCES | |
| Have relatives/ friends in NL | 2.0% |
| NL strictly a pleasure trip | 1.7% |
| NL is unique (not specific) | 2.2% |
| Born in NL/ visit here is to come home | 0.6% |
| NL was a place we had never seen before | 1.1% |
| Enjoyed NL more (i.e. a hidden treasure) | 0.6% |
| Maritime trips were of a shorter duration | 1.4% |
| Did less travel throughout Maritimes | 0.8% |
| Have relatives/ friends in Maritimes | 2.8% |
| Different reasons for going to each province | 0.8% |
| Maritimes not as distinctive as NL | 0.3% |
| More people visit Maritimes | 0.3% |
| Born in the Maritimes | 0.3% |
| NL has a different economy | 0.3% |
| Stayed with relatives while in Maritimes | 0.8% |
| No longer visit Maritimes since I found NL | 0.3% |
| NL has distinctive houses | 0.3% |
| Part of a group tour in NL | 0.3% |
| Had to discover things on our own in NL | 0.8% |
| NL feels more like Canada | 0.3% |
| NL was a camping trip | 0.3% |
| Spent more time outdoors in NL | 0.3% |
| | |
| Other Differences | 15.9% |
| Don't know/ Not sure | 2.5% |

NOTE: Percentages may exceed 100% due to multiple responses

Appendix F: Trip Highlights

Q16. What was the highlight of your trip? (Continued...)

| | Total | Leisure Visitors | |
|---|-------|-------------------|--------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 949 | 709 | 240 |
| Enjoyed local crafts (i.e. pottery studio) | .1% | .1% | .0% |
| Rented ATV for trail riding | .1% | .1% | .0% |
| Part of Screech In ceremony | .1% | .1% | .0% |
| Canoeing | .1% | .0% | .4% |
| Bishop's Falls | .1% | .1% | .0% |
| Home cooking | .1% | .1% | .0% |
| Hospital (i.e. Janeway) | .1% | .1% | .0% |
| We became a featured newspaper story (i.e. tourism) | .1% | .1% | .0% |
| Saw an archaeological dig | .1% | .1% | .0% |
| Interesting place overall | .1% | .0% | .4% |
| RCMP ride in St. John's | .1% | .1% | .0% |
| Found property/ home/ cabin I plan to purchase | .1% | .0% | .4% |
| Liked atmosphere | .1% | .0% | .4% |
| Played music for people in ferry lounge | .1% | .0% | .4% |
| Interesting flora | .1% | .1% | .0% |
| Purchased home/ property in the province | .1% | .1% | .0% |
| None - No highlights | .1% | .0% | .4% |

NOTE: Percentages may exceed 100% due to multiple responses

**Q16. What was the highlight of your trip?
- Responses Categorized -**

| | Total | Leisure Visitors | |
|-------------------------------------|-------|-------------------|--------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 949 | 709 | 240 |
| Specific attraction highlights | 51.7% | 59.8% | 27.9% |
| Specific activity highlights | 35.1% | 35.1% | 35.0% |
| Other highlights | 22.2% | 13.7% | 47.5% |
| Specific community highlights | 20.7% | 23.4% | 12.5% |
| Scenery highlights | 19.5% | 22.1% | 11.7% |
| People highlights | 11.1% | 13.4% | 4.2% |
| Specific event /festival highlights | 4.0% | 3.7% | 5.0% |
| Specific accommodation highlights | 3.6% | 4.7% | .4% |
| Don't know/ Not sure | 2.3% | 1.8% | 3.8% |
| None - No highlights | .1% | .0% | .4% |

NOTE: Percentages may exceed 100% due to multiple responses

Appendix G: Aspects Least Impressed With

Q17. What, if anything, were you least impressed with?

| | Total | Leisure Visitors | |
|---|-------|-------------------|--------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 949 | 709 | 240 |
| Don't know/ Not sure | 21.3% | 20.5% | 23.8% |
| Nothing - No negative comments | 19.9% | 18.9% | 22.9% |
| Transportation Problems | 14.1% | 13.0% | 17.5% |
| Attraction/ Service Problems | 10.5% | 11.8% | 6.7% |
| Poor state of roads/ highways | 5.4% | 5.5% | 5.0% |
| Accommodation Problems | 3.7% | 3.9% | 2.9% |
| Scenery/ Outdoor Problems | 3.5% | 3.4% | 3.8% |
| Cost Problems | 3.3% | 2.7% | 5.0% |
| General dislike of ferry | 1.8% | 1.3% | 3.3% |
| Poor weather (i.e. fog, rain, cold) | 1.8% | 2.0% | 1.3% |
| Other Problems | 1.6% | 1.7% | 1.3% |
| Gas prices too expensive | 1.1% | .7% | 2.1% |
| Poor signage/ confusing | .9% | 1.0% | .8% |
| Information Problems | .9% | 1.1% | .4% |
| High cost of boat/ ferry | .6% | .3% | 1.7% |
| Lack of certain foods (fruit, vegetables etc.) | .6% | .8% | .0% |
| Hotel/ cottage ratings misleading (i.e poor quality) | .5% | .7% | .0% |
| Same menu throughout province/ no variety | .5% | .7% | .0% |
| Lack of scenery (i.e. barren, no trees) | .5% | .7% | .0% |
| Lack of gas stations/ rest stops on highway | .4% | .6% | .0% |
| Poor quality camping/ campgrounds | .4% | .6% | .0% |
| Need more local craft stores | .4% | .6% | .0% |
| Poor customer service at restaurant | .4% | .4% | .4% |
| Distances between areas too far to travel | .3% | .3% | .4% |
| Ferry ride too long | .3% | .3% | .4% |
| Poor ferry crossing schedule/ delays | .3% | .3% | .4% |
| Lack of accommodations outside urban areas | .3% | .4% | .0% |
| Overall cost to travel to/ from province | .3% | .3% | .4% |

NOTE: Percentages may exceed 100% due to multiple responses

Q17. What, if anything, were you least impressed with? (Continued...)

| | Total | Leisure Visitors | |
|--|-------|-------------------|--------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 949 | 709 | 240 |
| Did not like local cuisine (jigs dinners) | .3% | .4% | .0% |
| Quality of food varied from place to place | .3% | .4% | .0% |
| Did not see any moose during trip | .3% | .4% | .0% |
| Required to have a guide for fishing/ hunting | .3% | .3% | .4% |
| Not enough time to see and do everything | .3% | .4% | .0% |
| No prior notice of ferry service cancellation | .2% | .1% | .4% |
| Problems with airlines | .2% | .3% | .0% |
| Concerns about moose crossings while driving | .2% | .1% | .4% |
| Poor seating on ferry trip | .2% | .0% | .8% |
| Lack of recreational vehicle suited campgrounds | .2% | .3% | .0% |
| Dislike motels (not specific) | .2% | .3% | .0% |
| Accommodation rates higher than advertised | .2% | .1% | .4% |
| Accommodations all booked up | .2% | .3% | .0% |
| Accommodations lacked running water | .2% | .3% | .0% |
| Poor customer service at bed and breakfast | .2% | .3% | .0% |
| Not enough bathroom/ shower facilities at parks | .2% | .3% | .0% |
| High costs for accommodations | .2% | .1% | .4% |
| High costs for park camping | .2% | .3% | .0% |
| Lobsters were not available for meals | .2% | .3% | .0% |
| Not impressed with Gander | .2% | .3% | .0% |
| Need wheelchair accessibility at sites/ tours | .2% | .3% | .0% |
| Too many bugs | .2% | .3% | .0% |
| Poor recycling program in province | .2% | .3% | .0% |
| People treated poorly by their government | .2% | .3% | .0% |
| Seasick while on ferry | .1% | .1% | .0% |
| Dog had to stay in kennel during ferry trip | .1% | .0% | .4% |
| No pillows/ blankets during ferry crossing | .1% | .0% | .4% |
| Cannot take your own vegetables on ferry | .1% | .1% | .0% |

NOTE: Percentages may exceed 100% due to multiple responses

Q17. What, if anything, were you least impressed with? (Continued...)

| | Total | Leisure Visitors | |
|---|-------|-------------------|--------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 949 | 709 | 240 |
| Confusing ferry bookings | .1% | .1% | .0% |
| No areas for taking pictures on highway | .1% | .1% | .0% |
| Poor line markings on roads | .1% | .1% | .0% |
| Should have roads connecting Labrador and Quebec | .1% | .1% | .0% |
| Expected international airport would be larger | .1% | .1% | .0% |
| Ferry broke down | .1% | .1% | .0% |
| Service stations on highways close too early | .1% | .0% | .4% |
| Too difficult to gain entry into province | .1% | .1% | .0% |
| Restrictions on rental cars (limited kms) | .1% | .1% | .0% |
| Not informed flights went to Gander | .1% | .1% | .0% |
| Local drivers overly aggressive | .1% | .1% | .0% |
| Long line ups for ferry tickets | .1% | .1% | .0% |
| Poor system for boarding ferry | .1% | .1% | .0% |
| Ferry dining room hours inconvenient | .1% | .0% | .4% |
| Airline would not help with accommodations | .1% | .1% | .0% |
| Delays at airports | .1% | .0% | .4% |
| Air conditioning on ferry too cold | .1% | .1% | .0% |
| Poor accommodations on ferry | .1% | .0% | .4% |
| Need more ferry departure times | .1% | .0% | .4% |
| Takes too long to travel to province | .1% | .1% | .0% |
| Could not get a cabin on the ferry | .1% | .0% | .4% |
| Not enough hotels | .1% | .1% | .0% |
| Lack of bed and breakfast locations | .1% | .1% | .0% |
| Parks going through construction/ upgrades | .1% | .1% | .0% |
| Motel was too musty | .1% | .1% | .0% |
| Cottage was not the one we booked | .1% | .1% | .0% |
| No consistent hotel standards throughout province | .1% | .1% | .0% |
| Lack of camping accommodations in Labrador | .1% | .1% | .0% |

NOTE: Percentages may exceed 100% due to multiple responses

Q17. What, if anything, were you least impressed with? (Continued...)

| | Total | Leisure Visitors | |
|--|-------|-------------------|--------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 949 | 709 | 240 |
| Problems with people/ noise at campsites | .1% | .1% | .0% |
| Hotels/ motels lacked cable TV | .1% | .1% | .0% |
| Poor management of sites at parks | .1% | .1% | .0% |
| High costs for hiking | .1% | .0% | .4% |
| High costs for fishing for non-residents | .1% | .0% | .4% |
| High cost of beer/ spirits | .1% | .1% | .0% |
| High cost of food | .1% | .1% | .0% |
| High cost of bed and breakfast | .1% | .1% | .0% |
| High prices at restaurants | .1% | .1% | .0% |
| National parks more expensive than other parks | .1% | .1% | .0% |
| Overcharged at restaurants/ bill mistakes | .1% | .1% | .0% |
| Not impressed with St. John's | .1% | .1% | .0% |
| Icebergs were gone during our visit | .1% | .1% | .0% |
| No shop could service our recreational vehicle | .1% | .1% | .0% |
| Certain areas had no electricity | .1% | .1% | .0% |
| Not impressed with St. Pierre | .1% | .1% | .0% |
| Not impressed with Bell Island | .1% | .1% | .0% |
| Certain sites/ attractions not open | .1% | .1% | .0% |
| Operating hours incorrectly advertised in travel brochure | .1% | .1% | .0% |
| No whales on whale watching tour | .1% | .0% | .4% |
| Nothing to help elderly up/ down stairs and hills | .1% | .1% | .0% |
| Cities not well kept | .1% | .1% | .0% |
| Lack of services for the hearing impaired | .1% | .1% | .0% |
| Poor living standards | .1% | .0% | .4% |
| Litter on beaches (i.e. glass) | .1% | .1% | .0% |
| Not impressed with Corner Brook | .1% | .1% | .0% |
| Strict rules/ regulations for fishing | .1% | .1% | .0% |
| No 911 response services in certain areas | .1% | .0% | .4% |

NOTE: Percentages may exceed 100% due to multiple responses

Q17. What, if anything, were you least impressed with? (Continued...)

| | Total | Leisure Visitors | |
|---|-------|-------------------|--------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 949 | 709 | 240 |
| A lot of visible poverty | .1% | .0% | .4% |
| Retailers lacked interact services | .1% | .1% | .0% |
| Lack of variety in postcards | .1% | .1% | .0% |
| Lack of shopping choices | .1% | .1% | .0% |
| Lack of places where you can eat | .1% | .1% | .0% |
| Boat tours all booked | .1% | .1% | .0% |
| High winds damaged our vehicle | .1% | .1% | .0% |
| Not enough daylight hours | .1% | .1% | .0% |
| Lack of farmland | .1% | .1% | .0% |
| Could not locate tourism information booth | .1% | .1% | .0% |
| No prior notice icebergs would be gone | .1% | .1% | .0% |
| Poor overall service at information booth | .1% | .1% | .0% |
| No entertainment listings (i.e. where and when) | .1% | .1% | .0% |
| Got a parking ticket/ expired meter on a Saturday | .1% | .1% | .0% |
| Poor service from non-tourism retailer | .1% | .0% | .4% |
| Attempted theft of our car | .1% | .1% | .0% |
| Lack proper infrastructure (waste disposal) | .1% | .1% | .0% |
| Could not take bottled moose home (i.e. mad cow scare) | .1% | .1% | .0% |

NOTE: Percentages may exceed 100% due to multiple responses

**Q17. What, if anything, were you least impressed with?
- Responses Categorized -**

| | Total | Leisure Visitors | |
|--|-------|----------------------|--------------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 949 | 709 | 240 |
| Problems with transportation | 27.1% | 25.1% | 32.9% |
| Don't know/ Not sure | 21.3% | 20.5% | 23.8% |
| Nothing - No negative comments | 19.9% | 18.9% | 22.9% |
| Problems with attractions /Services /Facilities | 16.9% | 19.5% | 9.2% |
| Problems with accommodations | 7.5% | 8.9% | 3.3% |
| Cost /Price problems | 6.5% | 5.2% | 10.4% |
| Outdoor /Scenery problems | 6.3% | 6.8% | 5.0% |
| Other | 2.8% | 3.2% | 1.7% |
| Information related problems | 1.4% | 1.7% | .4% |

NOTE: Percentages may exceed 100% due to multiple responses

Appendix H: Areas For Improvement

Q20. If there were two things (other than weather) that could be done to improve the experience on your trip, what would they be?

| | Total | Leisure Visitors | |
|---|-------|-------------------|--------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 949 | 709 | 240 |
| Don't know/ Not sure | 19.2% | 19.7% | 17.5% |
| Transportation Improvements | 18.8% | 17.3% | 22.9% |
| Nothing/ would not change a thing | 13.2% | 13.7% | 11.7% |
| Attraction/ Service Improvements | 10.6% | 11.1% | 9.2% |
| Other Improvements | 8.4% | 8.7% | 7.5% |
| Cost Improvements | 6.2% | 3.9% | 12.9% |
| Accommodation Improvements | 6.1% | 6.3% | 5.4% |
| Improve roads/ highways (i.e. repairs) | 5.6% | 5.9% | 4.6% |
| Information Improvements | 3.4% | 3.5% | 2.9% |
| Improve all ferry services | 2.8% | 2.0% | 5.4% |
| Ferry costs are too high | 2.4% | 2.0% | 3.8% |
| Needed more time to see everything | 2.3% | 2.8% | .8% |
| Lower the price of gas in the province | 1.8% | 1.4% | 2.9% |
| Improve signage | 1.7% | 1.7% | 1.7% |
| Ferry crossing takes too long | 1.6% | 1.0% | 3.3% |
| Need more camping areas | .8% | 1.1% | .0% |
| Need more activities for tourists | .8% | .4% | 2.1% |
| Takes too long to travel to province | .6% | .8% | .0% |
| More frequent ferry service | .6% | .6% | .8% |
| Need more restaurants | .6% | .8% | .0% |
| Outdoor/ Scenery Improvements | .6% | .8% | .0% |
| Improve routes within province | .5% | .7% | .0% |
| Need more accommodations | .5% | .7% | .0% |
| Need more local entertainment (i.e comedians) | .5% | .4% | .8% |
| Improve quality of food | .5% | .6% | .4% |
| Reduce rates for rental vehicles | .4% | .4% | .4% |
| Learn how to improve customer service (i.e. workshops) | .4% | .4% | .4% |
| Need picture taking areas along roads | .3% | .3% | .4% |

NOTE: Percentages may exceed 100% due to multiple responses

Q20. If there were two things (other than weather) that could be done to improve the experience on your trip, what would they be? (Continued...)

| | Total | Leisure Visitors | |
|--|-------|-------------------|--------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 949 | 709 | 240 |
| More rest stops on highways | .3% | .3% | .4% |
| Open up airline access to province | .3% | .4% | .0% |
| Need campgrounds equipped for RV vehicles | .3% | .4% | .0% |
| Parks too expensive (i.e. too many fees) | .3% | .4% | .0% |
| Accommodations too expensive (i.e. hotels) | .3% | .4% | .0% |
| Need more places to shop | .3% | .1% | .8% |
| Not enough sport fishing available | .3% | .4% | .0% |
| Review fishing regulations/ restrictions | .3% | .3% | .4% |
| Lack of public parking (i.e. downtown St. John's) | .3% | .3% | .4% |
| Expand restaurant menu/ need variety | .3% | .4% | .0% |
| Improve campground/ park information in general | .3% | .4% | .0% |
| More advertising of local events | .3% | .4% | .0% |
| Better planning for my trip was needed | .3% | .4% | .0% |
| Need a fixed link to province | .2% | .3% | .0% |
| Need more service stations | .2% | .3% | .0% |
| Show the long travel distances between sites | .2% | .3% | .0% |
| Airline service needs to be improved | .2% | .3% | .0% |
| Concerns about moose crossing on highways | .2% | .1% | .4% |
| Inadequate seating on ferry | .2% | .1% | .4% |
| Ferry service needs to be punctual | .2% | .1% | .4% |
| Need more cabins on ferry | .2% | .0% | .8% |
| Accommodations booked/ limited availability | .2% | .3% | .0% |
| Hotel ratings are misleading | .2% | .3% | .0% |
| Campgrounds need electricity | .2% | .3% | .0% |
| Need better utility hook ups at parks | .2% | .3% | .0% |
| Need more bed and breakfast locations | .2% | .3% | .0% |
| Need accommodations closer to ferry | .2% | .3% | .0% |
| Airfare to province too expensive | .2% | .3% | .0% |

NOTE: Percentages may exceed 100% due to multiple responses

Q20. If there were two things (other than weather) that could be done to improve the experience on your trip, what would they be? (Continued...)

| | Total | Leisure Visitors | |
|---|-------|-------------------|--------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 949 | 709 | 240 |
| More local music | .2% | .3% | .0% |
| More hiking trails | .2% | .0% | .8% |
| No icebergs during the time we visited | .2% | .3% | .0% |
| Longer hours of operation | .2% | .1% | .4% |
| Need brochures for specific regions | .2% | .3% | .0% |
| Better promotion of province for tourism | .2% | .1% | .4% |
| Provide wind warnings about Wreck House area | .2% | .3% | .0% |
| Longer ferry season | .1% | .0% | .4% |
| Need clear procedures for prepaid ferry boarding | .1% | .1% | .0% |
| Regular maintenance for all ferry ships | .1% | .1% | .0% |
| Improve meal menu on ferry | .1% | .1% | .0% |
| Need to have more than one major highway | .1% | .0% | .4% |
| Need two lane highway | .1% | .1% | .0% |
| Serve local cuisine on ferry for tourists | .1% | .0% | .4% |
| Need cleaner bathrooms on ferry | .1% | .0% | .4% |
| Keep gas stations open later into the evening | .1% | .0% | .4% |
| Show durations of travel time (ferry vs. car) | .1% | .1% | .0% |
| Need prior notice of ferry cancellations | .1% | .1% | .0% |
| Ferry needs more landing sites | .1% | .0% | .4% |
| Need direct flights to province | .1% | .0% | .4% |
| Need divided highway in province | .1% | .0% | .4% |
| Argentia ferry route should be open all year | .1% | .0% | .4% |
| Increase speed limit in the province | .1% | .1% | .0% |
| Need more trailer parks | .1% | .1% | .0% |
| Accommodations should be closer together | .1% | .1% | .0% |
| Need better reservation taking system | .1% | .1% | .0% |
| Need more hotels/ motels | .1% | .1% | .0% |
| No showers at parks/ comfort stations | .1% | .1% | .0% |

NOTE: Percentages may exceed 100% due to multiple responses

Q20. If there were two things (other than weather) that could be done to improve the experience on your trip, what would they be? (Continued...)

| | Total | Leisure Visitors | |
|--|-------|-------------------|--------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 949 | 709 | 240 |
| Trailer camping phasing out tent camping | .1% | .1% | .0% |
| Improve overflow areas at parks | .1% | .1% | .0% |
| Improve trail markings at parks | .1% | .1% | .0% |
| Need modern hotel accommodations | .1% | .1% | .0% |
| Better preservation of campgrounds | .1% | .1% | .0% |
| Campsites too close to each other | .1% | .1% | .0% |
| Bed & breakfast should be run by actual owners | .1% | .1% | .0% |
| Campgrounds should stay open later in the season | .1% | .1% | .0% |
| Improve facilities at national parks | .1% | .1% | .0% |
| Reduce cost to travel to province | .1% | .1% | .0% |
| Reservation fees too expensive (i.e national parks) | .1% | .1% | .0% |
| Beer / spirits too expensive | .1% | .1% | .0% |
| Everything is too expensive | .1% | .0% | .4% |
| Propane is too expensive | .1% | .1% | .0% |
| Provincial tax too high | .1% | .0% | .4% |
| Improve exchange rate for tourists | .1% | .1% | .0% |
| Boat tours too expensive | .1% | .1% | .0% |
| Food on ferry too expensive | .1% | .0% | .4% |
| Meals too expensive | .1% | .1% | .0% |
| No place to eat while waiting for ferry | .1% | .0% | .4% |
| More facilities around national parks | .1% | .0% | .4% |
| Retailers take advantage of tourists | .1% | .1% | .0% |
| Offer more nature experiences | .1% | .1% | .0% |
| Need services to help elderly tourists get around | .1% | .1% | .0% |
| No whales during the time we visited | .1% | .1% | .0% |
| Need larger food quantities for sale (i.e. seafood) | .1% | .1% | .0% |
| Poor cellular phone coverage | .1% | .1% | .0% |
| Longer tourist season/ extend season | .1% | .1% | .0% |

NOTE: Percentages may exceed 100% due to multiple responses

Q20. If there were two things (other than weather) that could be done to improve the experience on your trip, what would they be? (Continued...)

| | Total | Leisure Visitors | |
|---|-------|-------------------|--------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 949 | 709 | 240 |
| Need services to help physically challenged tourists | .1% | .0% | .4% |
| Lack of public washers/ dryers | .1% | .1% | .0% |
| Some areas of the province were run down | .1% | .0% | .4% |
| Improve bike trails | .1% | .1% | .0% |
| Rest stops on hiking trails too far apart | .1% | .1% | .0% |
| More stores around campground areas | .1% | .1% | .0% |
| Better schedule for boat tours | .1% | .1% | .0% |
| No premium gas at service stations | .1% | .1% | .0% |
| More activities for children | .1% | .0% | .4% |
| Easier access to rivers/ hunting areas | .1% | .0% | .4% |
| Use helicopters for for coastal tours | .1% | .1% | .0% |
| Improve restaurant service | .1% | .1% | .0% |
| More public transportation services | .1% | .0% | .4% |
| More historical sites | .1% | .0% | .4% |
| Restaurants need healthier foods | .1% | .1% | .0% |
| Better car rental services | .1% | .0% | .4% |
| Need prior notice if boat tours filled/ cancelled | .1% | .1% | .0% |
| Problems with bugs | .1% | .1% | .0% |
| Better directions for finding smaller areas | .1% | .1% | .0% |
| Inform tourists about all ferry crossings | .1% | .1% | .0% |
| More information for obtaining fishing licence | .1% | .1% | .0% |
| Better promotion of newer campgrounds/ parks | .1% | .1% | .0% |
| Correct mistakes in tourbook | .1% | .1% | .0% |
| More heritage backgrounds of communities | .1% | .1% | .0% |
| More local maps/ guides at visitor centre | .1% | .1% | .0% |
| Tourbook poorly organized | .1% | .1% | .0% |
| Promote family touring packages | .1% | .0% | .4% |
| Tourist information centres should open earlier | .1% | .1% | .0% |

NOTE: Percentages may exceed 100% due to multiple responses

Q20. If there were two things (other than weather) that could be done to improve the experience on your trip, what would they be? (Continued...)

| | Total | Leisure Visitors | |
|---|-------|-------------------|--------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 949 | 709 | 240 |
| Better training for information booth workers | .1% | .1% | .0% |
| Brochures should stress the need for early ferry bookings | .1% | .1% | .0% |
| Difficult to locate information booth (i.e. St. John's) | .1% | .1% | .0% |
| More information about wildlife | .1% | .1% | .0% |
| Courtesy tickets for minor violations (i.e. expired meter) | .1% | .1% | .0% |
| Subsidy for people coming home numerous times a year | .1% | .0% | .4% |
| Will leave kids home during our next visit | .1% | .1% | .0% |
| The Rooms are an eyesore/ remove them | .1% | .1% | .0% |
| Should have went earlier in the year | .1% | .1% | .0% |
| Should have flown, not driven to province | .1% | .1% | .0% |
| Educate myself more about the province before trip | .1% | .1% | .0% |
| Would cross island during daylight hours | .1% | .0% | .4% |

NOTE: Percentages may exceed 100% due to multiple responses

**Q20. If there were two things (other than weather) that could be done to improve the experience on your trip, what would they be?
- Responses Categorized -**

| | Total | Leisure Visitors | |
|---|-------|-------------------|--------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 949 | 709 | 240 |
| Transportation improvements | 36.6% | 33.6% | 45.4% |
| Don't know/ Not sure | 19.2% | 19.7% | 17.5% |
| Attractions /Services /Facilities improvements | 18.8% | 18.5% | 19.6% |
| Nothing/ would not change a thing | 13.2% | 13.7% | 11.7% |
| Cost /Price improvements | 12.8% | 9.9% | 21.3% |
| Other | 11.9% | 12.8% | 9.2% |
| Accommodation improvements | 10.5% | 12.3% | 5.4% |
| Information | 6.1% | 6.9% | 3.8% |
| Outdoor /Scenery | .7% | 1.0% | .0% |

NOTE: Percentages may exceed 100% due to multiple responses

Appendix I: Perceived Cultural Differences

Q18BB. In what way(s) is it different?

*****SUBPOPULATION: Respondents who offered a 7 to 10 rating to Q18B**

| | Total | Leisure Visitors | |
|--|-------|-------------------|--------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 786 | 572 | 214 |
| People Differences | 44.9% | 42.0% | 52.8% |
| Other Differences | 20.4% | 21.0% | 18.7% |
| People are friendlier/ more polite | 17.4% | 17.3% | 17.8% |
| People are more relaxed/ laid back | 8.8% | 10.3% | 4.7% |
| People are more open | 5.3% | 5.9% | 3.7% |
| Hospitable/ will take people in | 4.6% | 4.5% | 4.7% |
| Scenery Differences | 4.2% | 4.7% | 2.8% |
| Don't know/ Not sure | 4.2% | 3.8% | 5.1% |
| Music Differences | 4.1% | 3.8% | 4.7% |
| Variety of lingos/ dialects/ accents | 3.9% | 4.4% | 2.8% |
| People are very helpful | 3.1% | 3.0% | 3.3% |
| Community minded/ everyone knows everyone | 2.5% | 2.6% | 2.3% |
| Different lifestyle (i.e simple/ live off the land) | 2.4% | 2.8% | 1.4% |
| People have strong traditions/ historical roots | 2.3% | 1.6% | 4.2% |
| Different cuisine | 2.3% | 2.4% | 1.9% |
| Unique people in their ways/ mannerisms | 2.2% | 2.8% | .5% |
| Local music is distinctive | 2.0% | 2.4% | .9% |
| People are down to earth (i.e. humble) | 1.8% | 1.9% | 1.4% |
| Culture is unique/ distinct society | 1.5% | .9% | 3.3% |
| Remote/ isolated island | 1.4% | 1.9% | .0% |
| People are extroverted/ outgoing | 1.3% | .9% | 2.3% |
| Proud people (identity, independence, rights etc.) | 1.3% | 1.6% | .5% |
| People are happier/ enjoy themselves | 1.1% | 1.2% | .9% |
| No pretense with people/ no back doors | 1.1% | 1.2% | .9% |
| People are warmer | 1.1% | 1.2% | .9% |
| Older history than the rest of North America | 1.0% | 1.4% | .0% |
| People are not judgemental | .8% | .5% | 1.4% |
| People are more family oriented | .8% | .9% | .5% |

NOTE: Percentages may exceed 100% due to multiple responses

Q18BB. In what way(s) is it different? (Continued...)
*****SUBPOPULATION: Respondents who offered a 7 to 10 rating to Q18B**

| | Total | Leisure Visitors | |
|--|-------|-------------------|--------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 786 | 572 | 214 |
| People are honest | .8% | .9% | .5% |
| Distinct landscape | .6% | .7% | .5% |
| People have an island mentality | .6% | .7% | .5% |
| People have a great sense of humour | .6% | .9% | .0% |
| People influenced by elements (i.e. weather/ sea) | .6% | .9% | .0% |
| Music is part of their lives/ heritage | .6% | .5% | .9% |
| Outports are different | .6% | .9% | .0% |
| Few occupational choices/ financial hardships | .6% | .9% | .0% |
| Rugged | .5% | .5% | .5% |
| Hard to understand certain dialects | .5% | .7% | .0% |
| Not just interested in tourists for their money | .5% | .7% | .0% |
| People are more trusting | .5% | .3% | .9% |
| Outmigration a concern/ low population | .5% | .7% | .0% |
| Behind the times/ backwards/ primitive | .5% | .7% | .0% |
| Distinctive architecture | .4% | .3% | .5% |
| People speak their opinion | .4% | .3% | .5% |
| Have a life is for living outlook | .4% | .5% | .0% |
| They are in tune with the natural world | .4% | .3% | .5% |
| People are caring | .4% | .5% | .0% |
| Feel safer in this province | .4% | .3% | .5% |
| Different geography | .3% | .3% | .0% |
| Rocky scenery | .3% | .3% | .0% |
| Close to the ocean | .3% | .3% | .0% |
| Small, quaint villages | .3% | .3% | .0% |
| Different scenery in general | .3% | .2% | .5% |
| Take pride in their homes (i.e. very clean) | .3% | .3% | .0% |
| Know how to make their own fun | .3% | .2% | .5% |
| People are nicer | .3% | .2% | .5% |

NOTE: Percentages may exceed 100% due to multiple responses

Q18BB. In what way(s) is it different? (Continued...)
*****SUBPOPULATION: Respondents who offered a 7 to 10 rating to Q18B**

| | Total | Leisure Visitors | |
|--|-------|-------------------|--------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 786 | 572 | 214 |
| People are hard working | .3% | .2% | .5% |
| People are positive | .3% | .3% | .0% |
| Have a realistic outlook/ priorities in place | .3% | .3% | .0% |
| Small town type people | .3% | .2% | .5% |
| People are hearty/ tough | .3% | .3% | .0% |
| Different nightlife | .3% | .3% | .0% |
| Cultural festivals | .3% | .2% | .5% |
| People are more spread out | .3% | .3% | .0% |
| Fishermen cannot fish | .3% | .3% | .0% |
| Unique wildlife | .3% | .3% | .0% |
| Not overly commercialized | .3% | .3% | .0% |
| More old fashioned/ trip back in time | .3% | .2% | .5% |
| Get to view icebergs | .1% | .2% | .0% |
| No farmland | .1% | .2% | .0% |
| Unspoiled/ untouched | .1% | .0% | .5% |
| Natural beauty | .1% | .0% | .5% |
| Different weather | .1% | .2% | .0% |
| Coastline | .1% | .0% | .5% |
| Inspirational scenery | .1% | .2% | .0% |
| People in their service sector are not stuffy | .1% | .2% | .0% |
| People are more natural | .1% | .2% | .0% |
| Not caught up in material niceties | .1% | .2% | .0% |
| People are self reliant | .1% | .2% | .0% |
| Have a unique outlook on life | .1% | .2% | .0% |
| A mix of various cultural backgrounds | .1% | .2% | .0% |
| People are more defensive | .1% | .0% | .5% |
| Their customs are unique | .1% | .2% | .0% |
| People enjoy social events/ gatherings | .1% | .0% | .5% |

NOTE: Percentages may exceed 100% due to multiple responses

Q18BB. In what way(s) is it different? (Continued...)
*****SUBPOPULATION: Respondents who offered a 7 to 10 rating to Q18B**

| | Total | Leisure Visitors | |
|--|-------|-------------------|--------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 786 | 572 | 214 |
| People lack sophistication | .1% | .2% | .0% |
| People have strong sense of spirit | .1% | .2% | .0% |
| People will stop for pedestrians | .1% | .2% | .0% |
| Have their own literature/ poetry | .1% | .2% | .0% |
| Enjoyed local entertainers/ musicians | .1% | .2% | .0% |
| Songs celebrate local people/ lifestyle | .1% | .2% | .0% |
| Celtic influenced music | .1% | .0% | .5% |
| Different atmosphere | .1% | .2% | .0% |
| Did not see a big difference in the culture | .1% | .2% | .0% |
| More economically depressed | .1% | .0% | .5% |
| A place people want to be/ return to | .1% | .0% | .5% |
| Low population means low crime | .1% | .2% | .0% |
| Economy based on government programs | .1% | .2% | .0% |
| Towns forced to be self sufficient | .1% | .2% | .0% |
| Retail stores were not specialized | .1% | .2% | .0% |
| Irish/ British influences | .1% | .2% | .0% |
| Activities start later in the day | .1% | .2% | .0% |
| Cultural plays/ theatres | .1% | .2% | .0% |
| Have a more interesting culture | .1% | .0% | .5% |
| Colorful names to places/ communities | .1% | .2% | .0% |
| Set up of the communities is different | .1% | .2% | .0% |
| George Street (many bars in one place) | .1% | .0% | .5% |
| Quieter | .1% | .2% | .0% |
| Like Australia | .1% | .2% | .0% |
| More of a rural setting | .1% | .0% | .5% |

NOTE: Percentages may exceed 100% due to multiple responses

Q18BB. In what way(s) is it different?

- Responses Categorized -

*****SUBPOPULATION: Respondents who offered a 7 to 10 rating to Q18B**

| | Total | Leisure Visitors | |
|-----------------------------|--------|----------------------|--------------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 786 | 572 | 214 |
| People | 117.7% | 118.4% | 115.9% |
| Other | 29.9% | 32.2% | 23.8% |
| Scenery | 9.3% | 10.5% | 6.1% |
| Music | 7.6% | 7.7% | 7.5% |
| Don't know/ Not sure | 4.2% | 3.8% | 5.1% |

NOTE: Percentages may exceed 100% due to multiple responses

Appendix J: Information Sought on Website

Q39. What type of information were you looking for on the Tourism Newfoundland and Labrador website? (www.gov.nl.ca/tourism)

*****SUBPOPULATION: Respondents who visited the Tourism Newfoundland and Labrador web site? (www.gov.nl.ca/tourism)**

| | Total | Leisure Visitors | |
|--|-------|-------------------|--------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 510 | 409 | 101 |
| Site Information | 31.2% | 32.5% | 25.7% |
| Places to stay (accommodations and campgrounds) | 28.2% | 31.3% | 15.8% |
| Travel Information | 22.7% | 24.0% | 17.8% |
| General travel information | 21.0% | 22.5% | 14.9% |
| Attractions and adventures | 18.6% | 19.6% | 14.9% |
| Other Information | 16.3% | 16.1% | 16.8% |
| Festivals and events | 11.8% | 12.0% | 10.9% |
| Maps and distances to travel | 11.0% | 12.5% | 5.0% |
| How to get to Newfoundland & Labrador (trains, planes, automobiles) | 10.4% | 11.7% | 5.0% |
| Activities (Non nature related) | 10.2% | 9.3% | 13.9% |
| Scenic routes and touring Newfoundland & Labrador | 5.7% | 5.9% | 5.0% |
| Don't know/ Not sure | 5.7% | 4.4% | 10.9% |
| Nature - Viewing Activities | 5.5% | 5.4% | 5.9% |
| How to order a travel guide from Newfoundland and Labrador | 3.5% | 4.2% | 1.0% |
| Climate/ weather patterns | 2.7% | 3.4% | .0% |
| Amenities/ Service Information | 2.2% | 1.7% | 4.0% |
| In-province tours | 1.4% | 1.7% | .0% |
| Shops, studios and galleries | 1.0% | .5% | 3.0% |
| Hunting or fishing | .8% | 1.0% | .0% |
| Restaurant locations | .6% | .7% | .0% |
| Cycling (i.e. bike trails) | .6% | .7% | .0% |
| Vacation packages | .4% | .5% | .0% |
| Hours of operation | .4% | .2% | 1.0% |
| How to reinstate my Newfoundland citizenship | .2% | .0% | 1.0% |
| Link to Marine Atlantic | .2% | .2% | .0% |
| Prices/ rates | .2% | .2% | .0% |
| Historical sites (i.e. viking villages) | .2% | .0% | 1.0% |
| Gros Morne Park | .2% | .2% | .0% |

NOTE: Percentages may exceed 100% due to multiple responses

Q39. What type of information were you looking for on the Tourism Newfoundland and Labrador website? (www.gov.nl.ca/tourism) (Continued...)

*****SUBPOPULATION: Respondents who visited the Tourism Newfoundland and Labrador web site? (www.gov.nl.ca/tourism)**

| | Total | Leisure Visitors | |
|---|-------|-------------------|--------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 510 | 409 | 101 |
| Summer rentals | .2% | .2% | .0% |
| National parks | .2% | .2% | .0% |
| Labrador specific information | .2% | .2% | .0% |
| Updated tourism book | .2% | .2% | .0% |
| Coastal boats to Labrador | .2% | .2% | .0% |
| Road conditions in Labrador | .2% | .2% | .0% |
| Local guides for fishing trips | .2% | .2% | .0% |
| Scenery pictures | .2% | .0% | 1.0% |
| Northern Lights | .2% | .2% | .0% |
| Trinity | .2% | .0% | 1.0% |
| Northern Peninsula | .2% | .0% | 1.0% |
| Beaches | .2% | .2% | .0% |
| Bird tours | .2% | .2% | .0% |
| Crafts (i.e. pottery, glass) | .2% | .2% | .0% |
| Ferry schedule | .2% | .2% | .0% |
| Baptism certificate | .2% | .0% | 1.0% |
| Natural attractions | .2% | .2% | .0% |
| Books from Newfoundland | .2% | .2% | .0% |
| Availability of things | .2% | .2% | .0% |
| Boat rentals | .2% | .2% | .0% |
| Internet access in the province | .2% | .2% | .0% |
| Tours including services for the disabled | .2% | .2% | .0% |
| Eco-tourism information | .2% | .2% | .0% |
| Kayaking | .2% | .2% | .0% |
| Wind surfing information | .2% | .2% | .0% |

NOTE: Percentages may exceed 100% due to multiple responses

Q39. What type of information were you looking for on the Tourism Newfoundland and Labrador website? (www.gov.nl.ca/tourism)

- Responses Categorized -

*****SUBPOPULATION: Respondents who visited the Tourism Newfoundland and Labrador web site? (www.gov.nl.ca/tourism)**

| | Total | Leisure Visitors | |
|--|-------|----------------------|--------------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total (N) | 510 | 409 | 101 |
| Travel Information | 71.6% | 77.5% | 47.5% |
| Site Information | 59.6% | 64.1% | 41.6% |
| Activities (Non nature related) | 42.7% | 43.3% | 40.6% |
| Other Information | 24.1% | 24.7% | 21.8% |
| Amenities/ Service Information | 7.3% | 7.1% | 7.9% |
| Nature - Viewing Activities | 6.7% | 6.6% | 6.9% |
| Don't know/ Not sure | 5.7% | 4.4% | 10.9% |

NOTE: Percentages may exceed 100% due to multiple responses

Appendix K: Information Unavailable on Website

Q40. What information, if any, were you looking for but UNABLE to find on the website? (www.gov.nl.ca/tourism)
*****SUBPOPULATION: Respondents who visited the Tourism Newfoundland and Labrador web site? (www.gov.nl.ca/tourism)**

| | Total | Leisure Visitors | |
|--|-------|-------------------|--------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total | 510 | 409 | 101 |
| Found everything I was looking for | 80.8% | 80.2% | 83.2% |
| Don't know/ Not sure | 5.7% | 6.1% | 4.0% |
| Travel Information | 2.0% | 1.7% | 3.0% |
| Site Information | 2.0% | 2.4% | .0% |
| Places to stay (accommodations and campgrounds) | 1.2% | 1.5% | .0% |
| Nature - Viewing Activities | 1.0% | 1.0% | 1.0% |
| Other Information | .8% | .5% | 2.0% |
| Festivals and events | .6% | .2% | 2.0% |
| How to get to Newfoundland & Labrador (trains, planes, automobiles) | .6% | .5% | 1.0% |
| Maps and distances to travel | .6% | .7% | .0% |
| Cycling (i.e. bike trails) | .6% | .7% | .0% |
| Activities (Non nature related) | .6% | .7% | .0% |
| Amenities/ Service Information | .6% | .5% | 1.0% |
| Hunting or fishing | .4% | .5% | .0% |
| Restaurant locations | .4% | .5% | .0% |
| Scenic routes and touring Newfoundland & Labrador | .2% | .2% | .0% |
| How to order a travel guide from Newfoundland and Labrador | .2% | .2% | .0% |
| Searching for Newfoundland and Labrador's toll free tourism | .2% | .2% | .0% |
| How to reinstate my Newfoundland citizenship | .2% | .0% | 1.0% |
| Prices/ rates | .2% | .2% | .0% |
| Hours of operation | .2% | .2% | .0% |
| Summer rentals | .2% | .2% | .0% |
| Coastal boats to Labrador | .2% | .2% | .0% |
| Road conditions in Labrador | .2% | .2% | .0% |
| Local guides for fishing trips | .2% | .2% | .0% |
| Scenery pictures | .2% | .0% | 1.0% |
| Northern Lights | .2% | .2% | .0% |
| Trinity | .2% | .0% | 1.0% |

NOTE: Percentages may exceed 100% due to multiple responses

Q40. What information, if any, were you looking for but UNABLE to find on the website? (www.gov.nl.ca/tourism) (Continued...)
*****SUBPOPULATION: Respondents who visited the Tourism Newfoundland and Labrador web site? (www.gov.nl.ca/tourism)**

| | Total | Leisure Visitors | |
|--|-------|-------------------|--------------------------------|
| | | Vacation Pleasure | Visiting Friends and relatives |
| Total | 510 | 409 | 101 |
| Trinity | .2% | .0% | 1.0% |
| Northern Peninsula | .2% | .0% | 1.0% |
| Beaches | .2% | .2% | .0% |
| Crafts (i.e. pottery, glass) | .2% | .2% | .0% |
| Ferry schedule | .2% | .2% | .0% |
| Baptism certificate | .2% | .0% | 1.0% |
| Books from Newfoundland | .2% | .2% | .0% |
| Availability of things | .2% | .2% | .0% |
| Boat rentals | .2% | .2% | .0% |
| Internet access in the province | .2% | .2% | .0% |
| Tours including services for the disabled | .2% | .2% | .0% |
| Kayaking | .2% | .2% | .0% |
| Wind surfing information | .2% | .2% | .0% |

NOTE: Percentages may exceed 100% due to multiple responses