



**Labrador Travel Survey
Final Report**

June 2012



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Executive Summary

The Labrador Travel Survey is a benchmarking study to facilitate the assessment and planning process for tourism development in Labrador and was conducted with the primary objective to provide insights into travel experiences, activities and motivations of travellers in Labrador. Paper questionnaires were distributed from early July to mid-September at the regional visitor information centres (VICs) in Labrador City and Happy Valley-Goose Bay as well as the ferry terminal in Blanc Sablon.

Three segments of travellers were targeted: residents of Labrador, Island of Newfoundland residents and non-residents. Labrador residents were asked to provide information on overnight trips in Labrador during the period June to September 2010 and June to September 2011 while Island residents and non-residents were asked to provide information about their current Labrador trip. The survey focused on travellers by automobile to assess the impact of the Trans Labrador Highway (TLH) on respondents' trip experiences in Labrador.

Due to the methodology, survey results cannot be generalized; results are reflective of only those who responded to the survey. A total of 2,088 surveys was distributed during the survey period, with 794 useable returns, resulting in an overall response rate of approximately 38%. Ninety three percent of respondents received the questionnaire when exiting Labrador at Blanc Sablon.

All three target segments were well represented: 45% of respondents were non-residents, 29% were Labrador residents and 26% were Island residents. Respondents within all three segments are highly educated, with almost 70% indicating a post-secondary education, and have high average household incomes (over one third indicated \$100,000+). While there were as many Island respondents aged 35-54 and as there were aged 55+ (approximately one third each), two thirds of non-resident respondents were 55+.

Overall, the majority of respondents (65%) travelled in Labrador for vacation/pleasure, with Island residents being as likely to travel to Labrador to visit friends and family as they were to travel for vacation or pleasure. Ten percent of respondents – mostly Island and Labrador residents – travelled for business or work-related reasons while 5% were on a fishing trip. More than four in five Island respondents were repeat visitors to Labrador while only one in five non-resident respondents had been to Labrador before.

Island respondents were almost twice as likely to have travelled with children or other family members than non-residents (33% versus 17%), with almost two thirds of non-residents having travelled as couple(s) with no children. At an average of 6.8 nights, Island respondents also stayed almost three nights longer than non-residents (average of 4.1 nights). Length of stay also varied by main trip reason.

Island respondents were also distinct from non-resident respondents on other measures: Labrador was generally their primary trip destination (86% versus 14% of non-resident respondents), only 13% stayed for one night (35% non-residents) and 55% spent at least part of their trip in unpaid accommodations (10% non-residents).

L'Anse Au Clair and Happy Valley-Goose Bay were the top two destinations where both Island and non-resident respondents stayed at least one overnight, with Red Bay being another favourite among non-residents while Port Hope Simpson ranked third popular with Island respondents.

Scenic touring, pleasure walking in/around communities and iceberg viewing were the most popular activities both Island and non-resident respondents engaged in, with scenic touring also being by far the top prime motivator among non-residents (54%). It also topped Island residents' list of motivators at 15%, with fishing being a close second at 14%. Activities respondents participated in varied somewhat by main trip purpose.

The largest number of non-residents respondents visited National Historic Sites, gift/souvenir shops and VICs while many Island residents stopped by at gift shops and other stores as well as lighthouses and National Historic Sites. National and provincial historic sites were the most cited prime motivators for respondents' Labrador trips.

Over 40% of all Island and non-resident respondents indicated that the completion of the TLH at least partially influenced their decision to travel to Labrador in 2011. Overall, respondents travelled on a variety of itineraries but almost all respondents travelled along Route 510 between Blanc Sablon and Red Bay, with Labrador respondents indicating a higher incidence of travel along all routes compared to Island and non-residents. One quarter of non-resident respondents indicated that they entered Labrador via Quebec Route 389 and exited via Blanc Sablon ferry or vice versa.

When rating their experience travelling on the TLH, respondents within all three target segments identified road conditions, availability of cell phone service, rest stops, washrooms and emergency services as issues, with Labrador residents generally rating elements of their travel experience much lower than Island and non-residents. Additional comments respondents provided relay a strong sense of a need to improve road conditions and services as they are considered vital for travellers' safety.

About 70% of Island resident respondents and 73% of non-resident respondents indicated that they were highly satisfied with their Labrador trip while 9 in 10 respondents stated that Labrador met or exceeded their expectations. While the scenery, landscape, natural beauty and friendliness of the people resonated with all respondent segments, Labrador residents also enjoyed the small villages and communities, Island residents loved visiting their family and friends and non-residents found appeal in Labrador's history and related attractions. On the other hand, poor road conditions, flies and the lack of cell phone service were identified as least enjoyable aspects of respondents' trips.

With respect to future travel, more than three quarters of Island residents but only one quarter of non-residents indicated that they would be likely to visit Labrador again in the next five years, being drawn to the destination by family (Island residents) and the desire to see more of Labrador (non-residents). Among those Island residents and non-residents likely to return, fishing is also of great appeal. Non-residents indicated that the desire to visit other places, the travel distance and their age would most likely prevent them from returning to Labrador for another trip.

Survey results indicate that Labrador is perceived well among respondents as a destination for some forms of special interest travel, including fishing, nature-based/wilderness travel and adventure tourism.

Section 1: Introduction

1.1 Background

Tourism is an important factor in Labrador given that it is well positioned to take advantage of new and emerging forms of travel as adventure, cultural, aboriginal and nature-based tourism are gaining interest. Furthermore, the Trans Labrador Highway (TLH) is expected to have a significant impact on Labrador as a travel and tourism destination and marks a milestone in promoting Labrador to travellers and tourists. As identified in the Tourism Vision 2020 (Strategic Direction #4), there is a need to assess and plan for the impact of the TLH.

There are already many positive indicators of increased travel activity in Labrador including increased occupancy rates and record-breaking vehicle and passenger movements on the St. Barbe-Blanc Sablon ferry since the completion of the TLH. It is also anticipated that the TLH will help develop unique tourism experiences that are well-grounded in environmental sustainability and the protection of natural resources.

To date, little tourism-related research has been conducted pertaining specifically to Labrador and the information currently available is dated. The Department of Tourism, Culture and Recreation (TCR) conducted the Resident Travel Survey in 2010, however, this project focused on travel to the province as a whole and did not touch on elements specific to Labrador. Much has changed in visitor travel patterns and experiences sought, in addition to the increased accessibility of Labrador through the completion of the TLH. Thus, visitor profiles and characteristics from previous research needed to be updated along with information on current motivators and desired experiences required to inform marketing strategies, product development and local industry investment.

In addition, challenges faced by local tourism operators typically involve the uneven demand for their services, where many operators are at capacity during peak seasons, but have unused capacity in the off-season. This, for many, means that they have very short operating windows, which in turn can limit product and service availability in the off-season. Thus, understanding travel in Labrador is important to defining the future direction of the tourism industry in Labrador.

In summary, this study is meant to:

- facilitate the assessment and planning process;
- determine the role the TLH will play in addressing the demands and needs of today's travellers; and
- be tailored to the needs of Labrador's tourism stakeholders and address local tourism issues.

1.2 Objectives

The Labrador Travel Survey's primary objective was to *“provide insight into the travel habits, motivations and travel activities of travellers in Labrador”*.

More specifically, the 2011 Labrador Travel Survey was designed to:

- provide information (characteristics, demographics, activities, etc.) on travellers in Labrador, including out-of-province visitors, island residents travelling to Labrador, and Labrador residents travelling in Labrador;
- present insights into trends and motivations affecting travel to Labrador;
- identify opportunities and priorities for product/experience development in Labrador;
- assess the impact of the TLH on travel and tourism;
- identify priorities for the development and improvement of travel services; and
- identify any challenges experienced during visits, including identification of gaps in infrastructure, facilities, travel services or challenges related to travelling on the TLH.

Section 2: Research Methodology

2.1 Population

The population for this survey included the following segments:

- Labrador residents travelling within Labrador;
- Island residents travelling to Labrador; and
- Out-of-province (non-residents) visitors travelling to Labrador.

Given that one of the primary goals was to assess the TLH in relation to resident and non-resident travel, the Labrador Travel Survey focused on auto travellers.

The sampling unit was the travel party – with one individual from each travel party receiving a copy of the questionnaire to complete. Given the nature of this type of traveller, bus tours were excluded from the survey population.

To gain insights into travel experiences of Labrador residents, in particular experiences relating to travelling on the TLH, only responses from those residents indicating that they had travelled overnight in Labrador during the periods June – September 2010 and/or June – September 2011 were included in the analysis. Respondents were generally in a good position to report on their experiences as 63% indicated that they travelled the TLH “sometimes” or “often” during those periods.

2.2 Data Collection

Paper questionnaires and business reply envelopes were distributed by the Labrador partners to travellers. Distribution occurred at three points:

1. Happy Valley-Goose Bay

Staff at the VIC in Happy Valley-Goose Bay distributed questionnaires to travellers who entered the VIC during regular hours daily between July 4th and September 15th, 2011. Questionnaires were not distributed from August 10th to the 25th due to staff vacation.

2. Labrador City

Staff at the Labrador Gateway VIC in Labrador City distributed questionnaires to travellers who visited the centre during regular hours daily between July 5th and September 15th, 2011.

3. Blanc Sablon

The third location for survey distribution was the Blanc Sablon ferry terminal. Questionnaires were distributed by staff hired by the Labrador Straits Development Corporation at the Blanc Sablon ferry dock to travellers prior to boarding. Drop boxes to return completed questionnaires were placed in the gift shop onboard the ferry as well as in the ticket purchase area of the terminal. Crossings at Blanc

Sablon were sampled between July 8th and September 15th, 2011. A random sample of days and crossings were covered during the survey period.

The interviewer worked 6 hour shifts covering two crossings for each day sampled. Below is a summary of crossings and corresponding shift times. The crossings and shift times varied when the vessel was delayed.

Table 1: Blanc Sablon – St. Barbe Ferry Crossings and Shifts

Day	Crossings	Shift Times
Monday	8:00AM 1:00PM 6:00PM	6:00AM – 1:00PM 11:00AM – 6:00PM
Tuesday	10:30AM 3:30PM	8:30AM – 3:30PM
Wednesday	8:00AM 1:00PM	6:00AM – 1:00PM
Thursday	10:30AM 3:30PM	8:30AM – 3:30PM
Friday	6:00AM 10:45AM 3:45PM 8:00PM	4:00AM – 11:00AM 1:30PM – 8:30PM
Saturday	10:30AM 3:30PM	8:30AM – 3:30PM
Sunday	8:00AM 1:00PM 6:00PM	6:00AM – 1:00PM 11:00AM – 6:00PM

The table below illustrates the coverage rate for each scheduled crossing time. This information reflects the original monthly schedule and not the actual number of crossings which may have varied slightly due to weather or other unforeseen circumstances.

Table 2: Sampling Ratio Blanc Sablon – St. Barbe Ferry

Crossing Time	Number of Scheduled Crossings	Number of Crossings Sampled	% of Scheduled Crossings Covered
6:00AM	11	5	45.5%
8:00AM	32	11	34.4%
10:30AM	33	20	60.6%
10:45AM	11	5	45.5%
1:00PM	32	19	59.4%
3:30PM	33	16	48.9%
3:45PM	11	4	36.4%
6:00PM	22	9	40.1%
8:00PM	11	4	36.4%

Also provided below is a summary of vehicle traffic for the survey period at the Blanc Sablon ferry terminal. The traffic counts for July and September represent the total number of vehicles during the survey period.

Table 3: Vehicle Count During Survey Period

Period	Total Vehicles
July 8 – 31	4,227
August 1 – 31	5,156
September 1 - 15	1,950
Total	11,333

Coverage and Response Rate

Coverage is provided for the Blanc Sablon location due to the fact that this was the point where most surveys were distributed; detailed traffic information was unavailable for the other two locations.

Table 4: Labrador Travel Survey - Coverage

Location	Total Vehicle Count Survey Period	Total Visitors/Vehicles ¹	Total Visitors/Vehicles Approached	Coverage Rate	Surveys Distributed	Surveys Returned	Response Rate
Blanc Sablon	11,333	3,458	2,398	69%	1,715*	737	43%

* Coverage data was unavailable for the September 9th – 15th period for Blanc Sablon, however, based on the distribution during September 1st – 8th and the number of undistributed questionnaires, it was estimated that 1,715 questionnaires were distributed in total in this location.

The following table illustrates the number of surveys distributed by location. The Blanc Sablon location had the greatest volume of traffic, the greatest number of returned questionnaires and the highest percentage of travellers willing to participate in the survey.

Table 5: Labrador Travel Survey - Coverage

Location	Total Visitors/Vehicles ²	Total Visitors/Vehicles Approached	Surveys Distributed	% Willing	Refusals
Labrador City	N/A	512	242	47%	270
Happy Valley-Goose Bay	217	211	131	62%	80
Blanc Sablon	3,458	2,398	1,715*	72%	627
Total	3,675	3,121	2,088	67%	977

* Coverage data was unavailable for the September 9th – 15th period for Blanc Sablon, however, based on the distribution during September 1st – 8th and the number of undistributed questionnaires, it was estimated that 1,715 questionnaires were distributed in total in this location.

¹ Total Visitors/Vehicles based on counts conducted by interview during periods when surveys were being distributed.

² Total Visitors/Vehicles based on counts conducted by interview during periods when surveys were being distributed.

The following table illustrates the number of surveys distributed by month overall. Distribution was relatively even throughout the survey period with September being significantly lower given surveys were only distributed for the first two weeks of the month.

Table 6: Surveys Distributed by Month

Month	n
July	913
August	841
September	334*
Total	2,088

* Coverage data was unavailable for the September 9th – 15th period for Blanc Sablon, however, based on the distribution during September 1st – 8th and the number of undistributed questionnaires, it was estimated that 334 questionnaires were distributed in total in during the survey period in September.

As a result of the uneven distribution, 82% of travellers received their questionnaire in Blanc Sablon. Six percent received their questionnaire in Happy Valley-Goose Bay and just 12% picked up their questionnaire in Labrador City.

A total of 2,088 questionnaires was distributed during the survey period with 794 useable returns, resulting in an overall response rate of approximately 38%. The table below illustrates the final number of responses by origin.

Table 7: Final Sample – By Origin

Origin	n
Labrador	227
Newfoundland (Island)	206
Out-of Province (Non-Residents)	361
Total	794

The following table shows the number of questionnaires returned by distribution location.

Table 8: Final Sample by Location

Location Distributed	n
Labrador City	5
Happy Valley-Goose Bay	52
Blanc Sablon	737
Total	794

2.3 Questionnaire Design

Given the desire to survey all travellers on the TLH (Labrador residents, Island of Newfoundland residents and non-residents), the questionnaire was divided into sections with questions relevant to specific travel segments. It was determined that not all questions would be suitable for Labrador residents and therefore this group was asked to answer only a subset of questions which included reasons for travelling in Labrador, sections travelled on the TLH, rating of the travel experience in general and for the TLH and demographic information. Due to the survey methodology, Labrador residents were not asked about specific trip activities, use of accommodations, communities visited or trip satisfaction.

The questionnaire was designed to gather information on:

- demographics of travellers in Labrador;
- overall perceptions of the Labrador travel experience;
- characteristics of Labrador travel (main purposes, length of stay, destinations visited);
- insights into travel experiences sought;
- experiences on the TLH including the sections travelled;
- insights into trip activities/experiences and prime motivators for Labrador travel;
- interest in emerging travel experiences
- elements of the Labrador travel experience that could be improved; and
- propensity for future travel to Labrador

The questionnaire was developed in consultation with TCR. A copy of the questionnaire is presented in Appendix A.

2.4 Reporting

Given the survey methodology, the results from this survey cannot be generalized to the **total** population of travellers who have visited Labrador in the summer of 2011. The results detailed in this report are only a summary of travellers who **visited** Labrador in 2011 **and participated** in the Labrador Travel Survey.

Throughout the report, given the variation in responses depending on respondent origin, the majority of results are presented by three sub-segments (Labrador residents, Newfoundland [Island] residents, and non-residents). In instances where the number of responses was too small, results are shown at the overall aggregate level.

Given that a self-completion methodology was used for this survey, some respondents chose not to answer all applicable questions. For each question, where “no response was provided”, the cases were removed from the analysis. As a result, the number of survey respondents for each graph/table in the report varies. The number of respondents who answered each question is identified throughout the report. Results in this report have been categorized by major themes. Significant differences identified in the various analyses are presented within the discussion of the thematic area.

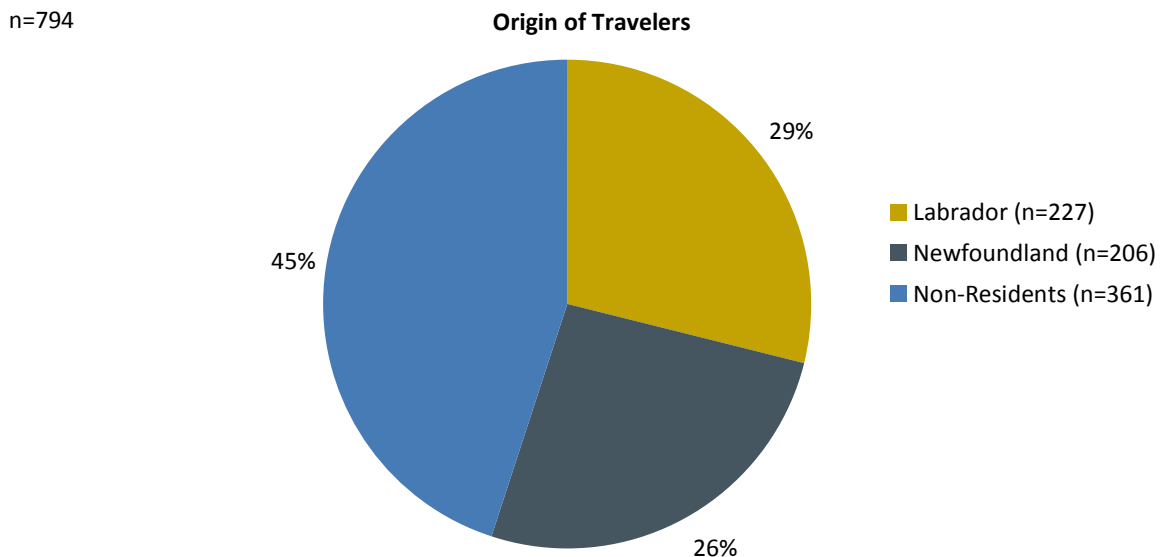
Section 3: Profile of Travellers in Labrador

The following section provides profiles of travellers to Labrador who participated in the survey.

3.1 Traveller Overview

Origin

Among those who responded to the Labrador Travel Survey in 2011, three-in-ten were Labrador residents, one-quarter were residents of the island portion of the province and 45% were non-residents.



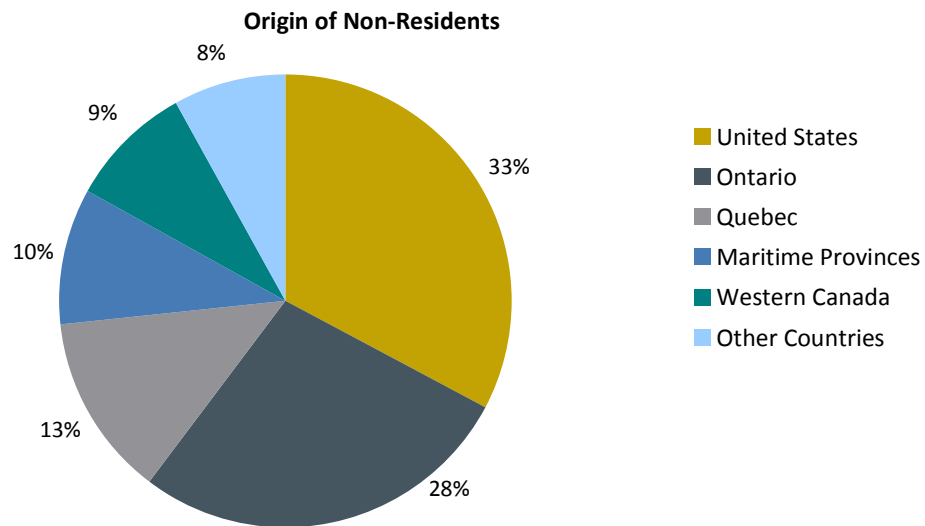
Island and Labrador respondents were examined more closely to identify where travellers originated. Using the postal code information provided by respondents, travellers were grouped by region. As the table below indicates, three-in-ten Island travellers to Labrador originated from each of St. John’s CMA and Other Western regions of the province. Just over one-in-ten originated from each of Other Eastern, Central and Corner Brook areas of the province. Approximately a third of survey respondents from Labrador each live in Southwest Labrador and Happy Valley-Goose Bay. Just over one in five Labrador respondents reside in Labrador City.

Table 9: Region of Origin of Newfoundland and Labrador Respondents

Newfoundland Region	Newfoundland Residents n=194	Labrador Region	Labrador Residents n=210
St. John’s CMA	31%	Labrador Straits	30%
Other Eastern	12%	Happy Valley-Goose Bay	33%
Central	14%	Other Central	5%
Corner Brook	12%	Labrador City	22%
Other Western	30%	Other Western/Northern	10%

Among non-residents, one-third originated from the United States, 28% travelled from Ontario and 13% were residents of Quebec. There were very few travellers from outside of Canada and the United States (8% of non-residents, 3% of all respondents), including from Germany, Australia and Switzerland.

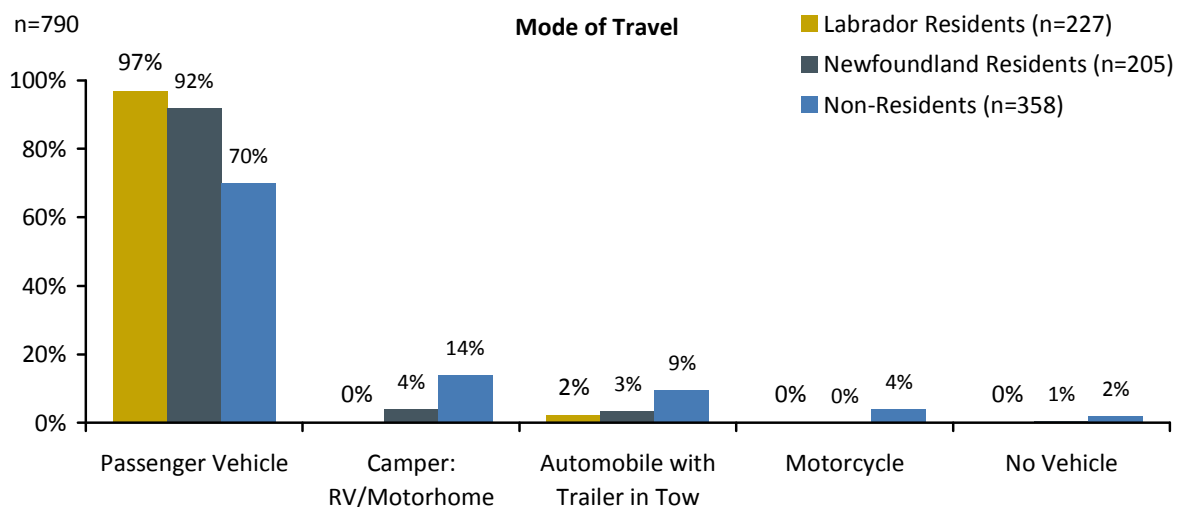
n=361



Mode of Travel

The majority of respondents travelled by automobile (car/van/pickup/sport utility vehicle). While the majority of non-residents travelled by passenger vehicle, they were significantly less likely to be travelling in a passenger vehicle. Of the three segments, they were the most likely to be travelling in a recreational vehicle (RV)/motorhome (14%) or in an automobile with a trailer in tow (9%). Among non-residents, there was no difference in the incidence of visitors travelling in an RV depending on Origin (Canada versus United States).

n=790



Very few respondents were travelling with a recreational vehicle, including all terrain vehicles (ATV), motorcycles, boats/kayaks and bicycles.

Only a small portion of respondents (13%) were travelling in a rented vehicle. Just 2 percent of Island residents said the vehicle they were travelling in was rented compared to 28 percent of non-residents. Just one Labrador resident reported travelling in a rented vehicle.

A profile of each of the three travel segments is presented below. It should be noted that not all questions reported were asked of all respondents.

3.2 Traveller Profile – Labrador Residents

The following is a profile of Labrador residents who participated in the 2011 Labrador Travel Survey.

Demographics

At the time of this survey, residents of Labrador travelled with a diverse group of companions across age groups. One quarter were children under 18 while 23% were 55 or older. Sixteen percent fell into the 18 to 34 age group, with the largest group being age 35 to 54 (36%). It must be noted, however, that Labrador residents who responded to the survey received the questionnaire when they exited Labrador and the age information provided is only applicable to their specific trip at that time. Age information for other travel of Labradorians in Labrador cannot be inferred from that.

Labrador residents travelling in Labrador were well-educated. Almost six-in-ten had a university or post-graduate degree while just over one-quarter attended a community or technical college.

In terms of income levels, respondents from Labrador appear more affluent than respondents from the other two segments, with 44% reporting average annual household incomes of \$100,000 or more. Only 13% indicated incomes of less than \$40,000. The tables below illustrate the distribution of age, education level and income of traveller parties who responded to the survey.

Table 10: Demographics

Labrador Residents ³		Labrador Residents		Labrador Residents	
Age Group	%	Education Level	%	Household Income	%
Under 18	25%	High School or Less	16%	Less than \$40,000	13%
18 – 34	16%	Community/Technical College	27%	\$40,000 to \$69,999	22%
35 – 54	36%	University	52%	\$70,000 to \$99,999	22%
55 or older	23%	Post Graduate	6%	\$100,000 or more	44%

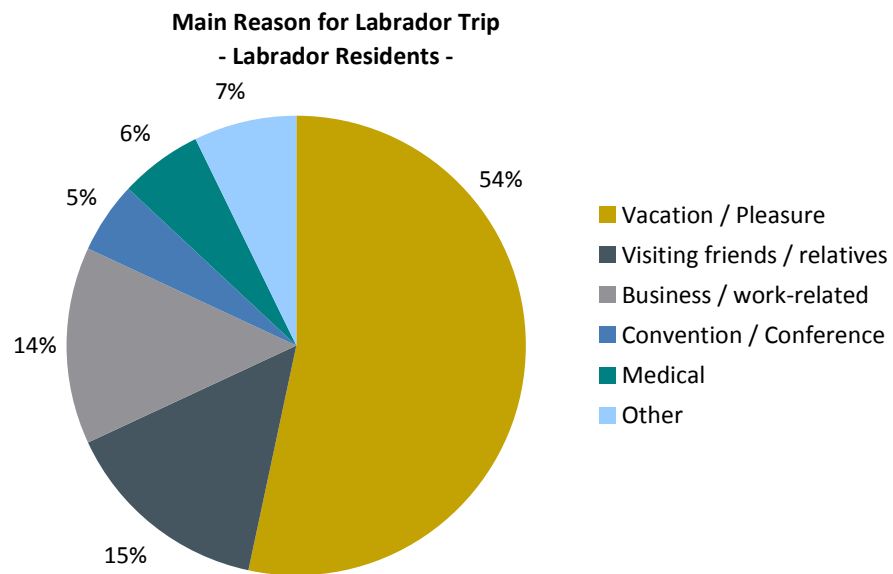
³ Extrapolated based on the age of all members of each respondent's travel party

Main Purpose

In order to investigate Labradorians’ travel experience in Labrador, this group of respondents was asked to consider all their travel in Labrador during the period June – September 2010 and/or June – September 2011 and report the typical main reason for these trips. Over one-half of Labrador respondents indicated they had travelled in Labrador for vacation or pleasure. Significantly fewer respondents were visiting friends and family (15%) or travelled for business/work (14%). Even fewer Labrador residents indicated they were travelling for a conference/convention (5%) or medical reasons (6%). “Other” reasons included family reasons (2%) and hunting (2%).

It should be noted that these results could be skewed due to the survey methodology. Labrador residents responded to the survey when they were leaving Labrador for a specific trip which may have taken place for other purposes than those trips in Labrador they were asked about – the potential that respondents may have been thinking about the current trip purpose to an out-of-Labrador destination may have impacted survey responses.

n=170



Incidence of Travelling Overnight on the TLH

Survey results indicate that Labrador residents have experience travelling the TLH, with 93% indicating that had travelled on the TLH during the summers of 2010 and/or 2011 as part of an overnight trip. Among those who had travelled on the TLH for an overnight trip, one half indicated they “often” travelled the highway while one third indicated that they “sometimes” travelled on the TLH during that period. Only 17% rarely travelled the TLH.

3.3 Traveller Profile – Island Residents

The following is a profile of Newfoundland residents who participated in the 2011 Labrador Travel Survey.

Demographics

Travellers who were part of the travel parties from the Island of Newfoundland were more likely to be above 35 years of age. Thirty five percent were in the 35 to 54 age group while a further one third were 55 or older. Eighteen percent of travellers were children under 18 and just 13% were ages 18 to 34.

Similar to the other segments, Island visitors to Labrador were well-educated. While almost half of respondents indicated a university degree, another 19% reported a post graduate degree. More affluent respondents appear to have travelled to Labrador, with 35% reporting an average annual household income of \$100,000 or more. Island resident respondents reported a higher share of lower incomes than the other segments, with almost one in five indicating incomes of less than \$40,000.

Table 11: Demographics

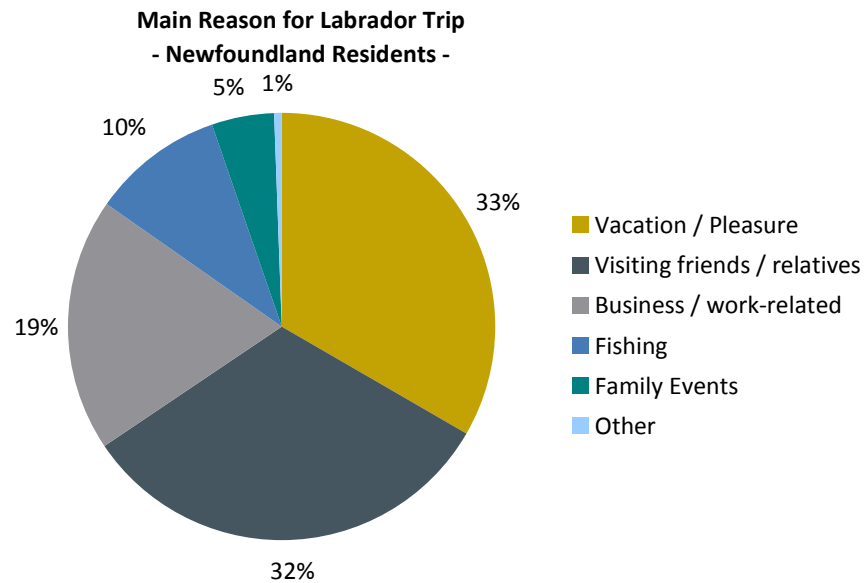
Newfoundland Residents ⁴		Newfoundland Residents		Newfoundland Residents	
Age Group	%	Education Level	%	Household Income	%
Under 18	18%	High School or Less	13%	Less than \$40,000	18%
18 – 34	13%	Community/Technical College	21%	\$40,000 to \$69,999	25%
35 – 54	35%	University	48%	\$70,000 to \$99,999	23%
55 or older	33%	Post Graduate	19%	\$100,000 or more	35%

Main Purpose

About a third of Island residents who responded to the survey travelled to Labrador for vacation or pleasure while an almost equal number (32%) reported having come to Labrador to visit friends or relatives. Nineteen percent were in Labrador for business purposes, and at 10%, Island residents were the most likely of all three segments to have travelled to Labrador to go fishing.

⁴ Extrapolated based on the age of all members of each respondent's travel party

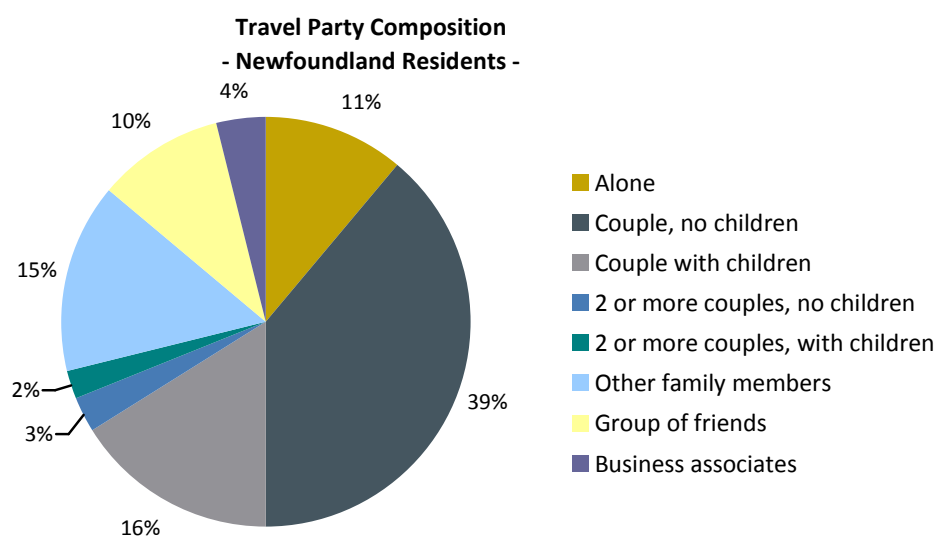
n=192



Party Size and Composition

Island of Newfoundland residents were travelling with an average party size of 2.7. The majority of Island residents (51%) were travelling with a party size of 2 while 13% of respondents travelled alone. Almost one in ten respondents were travelling with a party size of 5 or greater. The most common travel party among Island residents was couple(s) with no children (42%). On the other hand, 18% were travelling as a couple(s) with children. Adding another 15% who were travelling with other family members, it appears that for one third of Island resident respondents travelling to Labrador was a “family affair”.

n=180



Return Visitors

There was a high level of repeat visitation among Island resident respondents. Eighty four percent of these respondents indicated that they had previously been to Labrador. This is not surprising given the fact that a significant portion of island residents indicated their main purpose was to visit friends and family in Labrador.

For the majority of return visitors their most recent trip was in the past couple of years, with one third of respondents reporting that their most recent trip was in the same year – 2011 –, while another one third indicated it was in 2010. When asked why they had come back to Labrador, 44% of respondents mentioned visits family and friends. At 19%, a considerable number of respondents had returned to Labrador due to a business trip while almost as many (17%) indicated that they had returned for fishing. Special occasions, other personal reasons as well as Battle Harbour were also mentioned by a number of respondents (3% each). The table below summarizes the reasons provided by respondents.

**Table 12: Reasons for Coming Back to Labrador
- Top Mentions -**

	Newfoundland Residents n=139
Family in NL	44%
Current Trip for Business	19%
Fishing	17%
Friends in NL	13%
Vacation/great place to visit	8%
Other outdoor activities (e.g. hiking, kayaking)	7%
Born in NL	6%
Scenery/landscape	4%

3.4 Traveller Profile – Non-Residents

The following is a profile of non-residents who participated in the 2011 Labrador Travel Survey.

Demographics

Responses from non-resident visitors to Labrador indicate that this segment is the most likely to consist of older travellers, with two thirds being 55 years or older. A further one fifth were 35 to 54. Just 12% of all non-resident travellers were under the age of 35.

Non-resident respondents were the most educated of the three segments: Three quarters of this group indicated they had a university (42%) or a post graduate (34%) degree. Nearly twice as many non-residents had a post graduate degree compared to Island residents.

Similar to the other two segments, non-resident respondents also indicated a relatively high level of affluence, with over one third of respondents reporting average annual household incomes of \$100,000

or more. Just 11% of non-residents had an income of under \$40,000 which was significantly lower than among Island residents (18%).

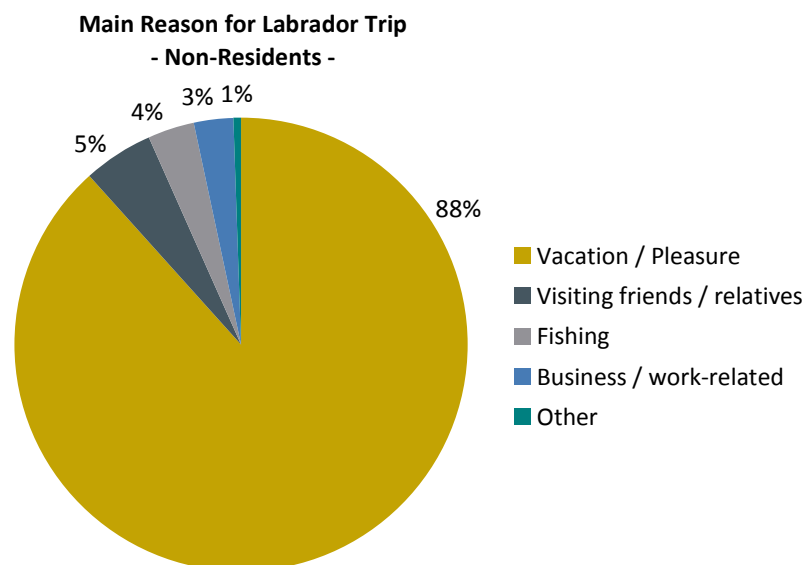
Table 13: Demographics

Non-Residents ⁵		Non-Residents		Non-Residents	
Age Group	%	Education Level	%	Household Income	%
Under 18	7%	High School or Less	12%	Less than \$40,000	11%
18 – 34	5%	Community/Technical College	12%	\$40,000 to \$69,999	27%
35 – 54	21%	University	42%	\$70,000 to \$99,999	26%
55 or older	67%	Post Graduate	34%	\$100,000 or more	36%

Main Purpose

At 88%, non-resident respondents were by far the most likely to report that they were travelling to Labrador on a vacation or pleasure trip. Only a small proportion of non-resident respondents came to Labrador for other reasons, including visiting friends and relatives (5%), fishing (4%) and business (3%). These results are likely impacted by the survey methodology which focused on auto travellers and the majority of non-resident respondents received the questionnaire at the Blanc Sablon ferry terminal.

n=345



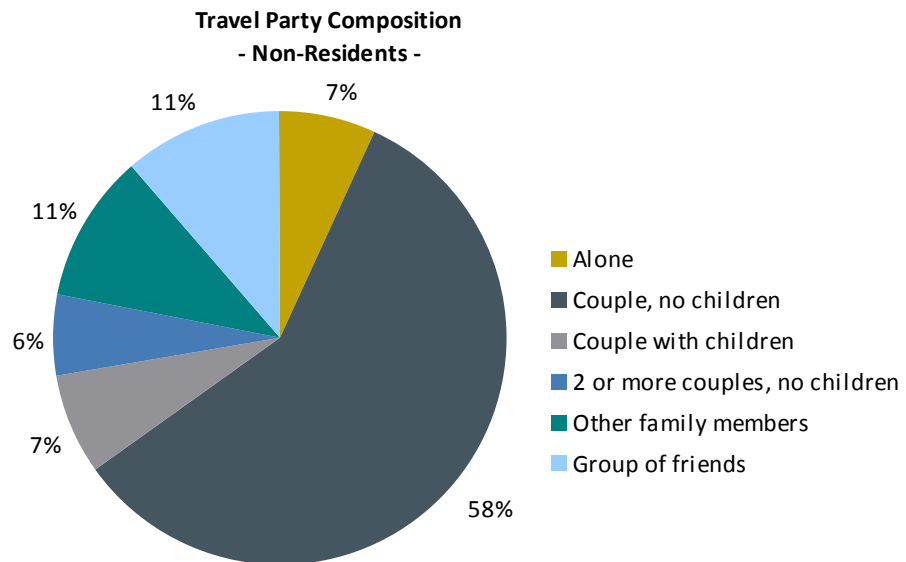
Party Size and Composition

Non-resident respondents were travelling with an average party size of 2.4 which was significantly lower compared to Island residents of Newfoundland, with two thirds travelling in a party of two. Five percent of respondents travelled as a party of five or more. Non-residents were the most likely to be travelling

⁵ Extrapolated based on the age of all members of each respondent's travel party

as couple(s) with no children (64%) and only 18% travelled with children or other family members, in stark contrast to travellers from the Island.

n=344



Return Visitors

Also in contrast to Island resident respondents, non-residents were much less likely to have been return visitors to Labrador at 21% and their reasons for a return were much more varied. The scenery and landscape as well as having family in NL topped the list and 27% and 25% respectively, with the TLH (17%) also having considerable appeal. Fishing, the people and the desire to see more of the province also prompted some non-residents to come back to Labrador.

Table 14: Reasons for Coming Back to Labrador – Top Mentions

	Non-Residents n=60
Scenery/landscape	27%
Family in NL	25%
Trans-Labrador Highway	17%
Fishing	12%
Current Trip for Business	12%
The people	8%
To see other areas of NL	8%
Vacation/great place to visit	5%
Friends in NL	5%
To see changes over time	5%
Other outdoor activities	5%

Summary

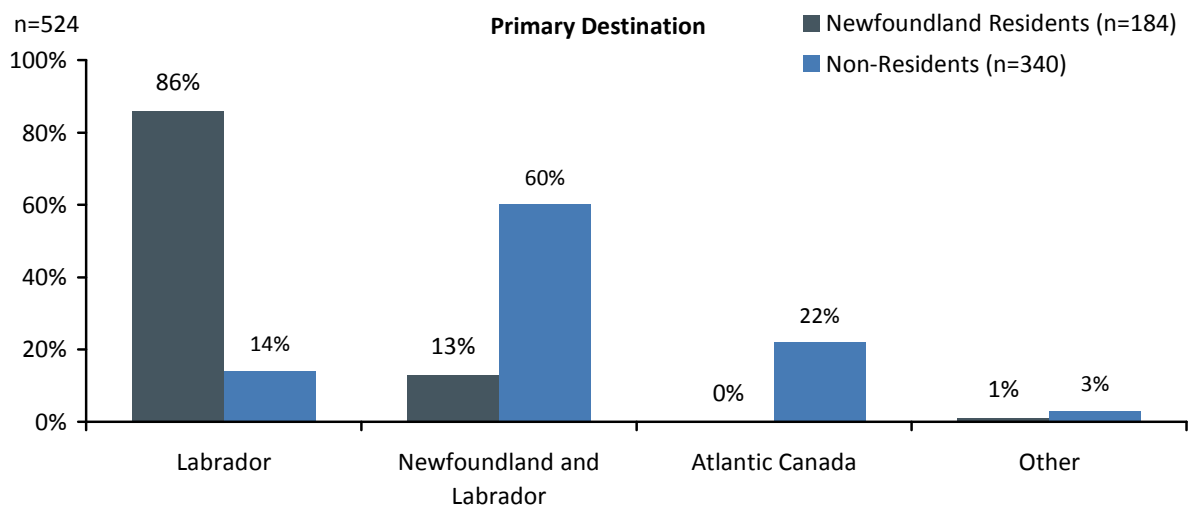
- Survey respondents who travelled to Labrador during the survey period tended to be highly educated and affluent.
- Particularly non-resident respondents tended to be older and travelling as couple(s) with no children while Island resident respondents' travel to Labrador had a more family oriented character.
- Non-residents primarily visited Labrador for vacation or pleasure while Island residents were as likely to travel for vacation or pleasure as they were to visit family and friends
- Non-residents were much less likely to be return visitors to Labrador compared to Island residents which is linked in part to the fact that Island residents are much more likely to be in Labrador to visit friends and family or on business.

Section 4: Labrador Trip Itineraries

This section provides an overview of respondents’ “itineraries” for their Labrador travel. This includes the destinations they visited and stayed overnight during their trip. Note that these questions were asked of Island resident and non-resident segments only.

4.1 Labrador as a Primary Trip Destination⁶

Travellers’ primary destination varied greatly depending on their place of origin. Labrador was the primary destination for 86% of respondents from the island portion of the province compared to just 14% of non-residents. This is consistent with the fact that for many Island residents, the main purpose of their trip was to visit friends and family. Three in five non-residents were visiting Labrador as part of a trip to the entire province and just over one in five were visiting as part of a trip to Atlantic Canada. Only a few respondents indicated their primary destination was outside of Atlantic Canada.

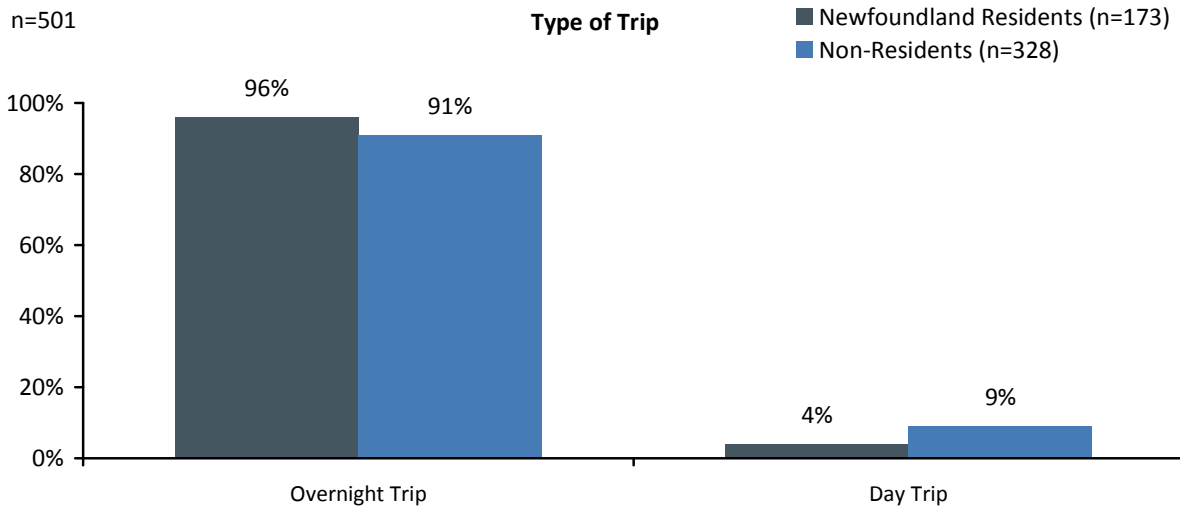


4.2 Type of Trip

Travellers from Newfoundland and non-residents were asked whether their trip to Labrador was a day or overnight trip. Over nine in ten respondents in each segment indicated that their Labrador trip was an overnight trip.

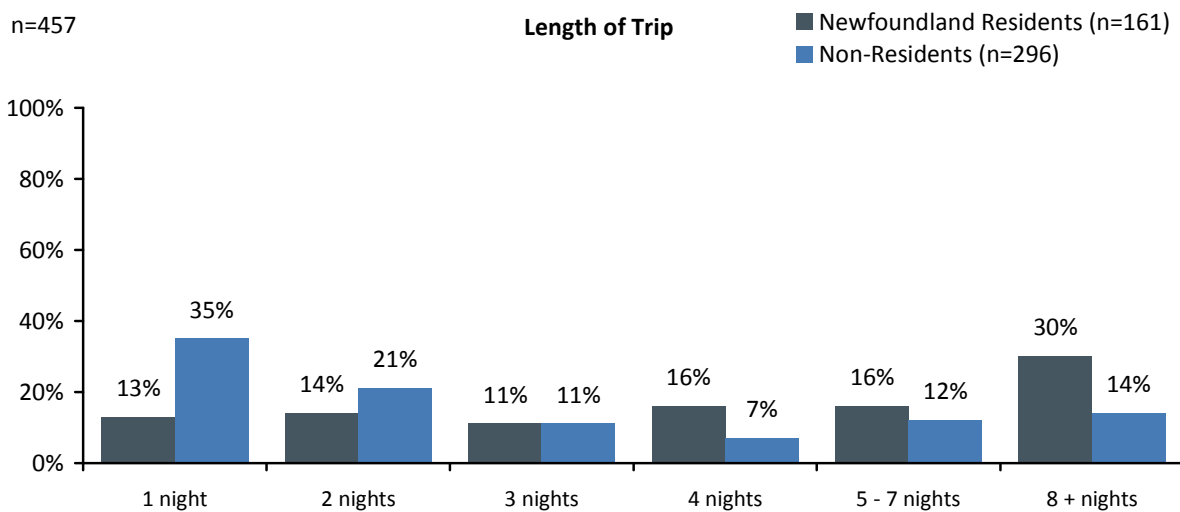
Among those who indicated a day trip (n=21), respondents named a number of places as their primary destinations for the day, including Red Bay, Forteau, Labrador City, Happy Valley-Goose Bay, L’Anse au Clair, Cartwright and L’Anse au Loup.

⁶ Specific questions on destinations visited within Labrador was only asked of non-Labradorians



It should also be noted that 25% of non-resident respondents indicated that they took a trip along the completed TLH, either entering Labrador via Route 389 from Quebec and exiting via the Blanc Sablon ferry or vice versa.

Overnight travellers were asked to provide specific details about their stay in Labrador. On average, Island resident respondents spent 6.8 nights in Labrador compared to 4.1 for non-resident respondents. At 35%, non-residents were significantly more likely to spend just one night in Labrador compared to Newfoundland residents (13%). A considerable number of Island resident respondents – more than two thirds – spent four or more nights in Labrador compared to just one third of non-resident respondents who did likewise. More than twice as many Island respondents than non-resident respondents stayed for more than a week (8+ nights).



Trip length varied depending on main purpose. Travellers visiting Labrador for work spent the most time in Labrador (10.3 nights), followed by those who visited friends and relatives (8.3 nights). Visitors travelling for vacation or pleasure spent the least amount of time in Labrador at 3.7 nights.

4.3 Destinations Visited

The top destinations for Island of Newfoundland residents and non-residents are outlined in the table below. These results reflect only travellers who exited at the Blanc Sablon ferry terminal and who indicated that they stayed in these communities for at least one overnight. Both non-resident and Island resident respondents were most likely to have visited L’Anse au Clair and Happy Valley-Goose Bay. Non-residents were more likely to visit Red Bay, Labrador City-Wabush and Churchill Falls while Port Hope Simpson, Forteau and Mary’s Harbour were more popular with Island residents. Significant differences between Island residents and non-residents are highlighted in the table below.

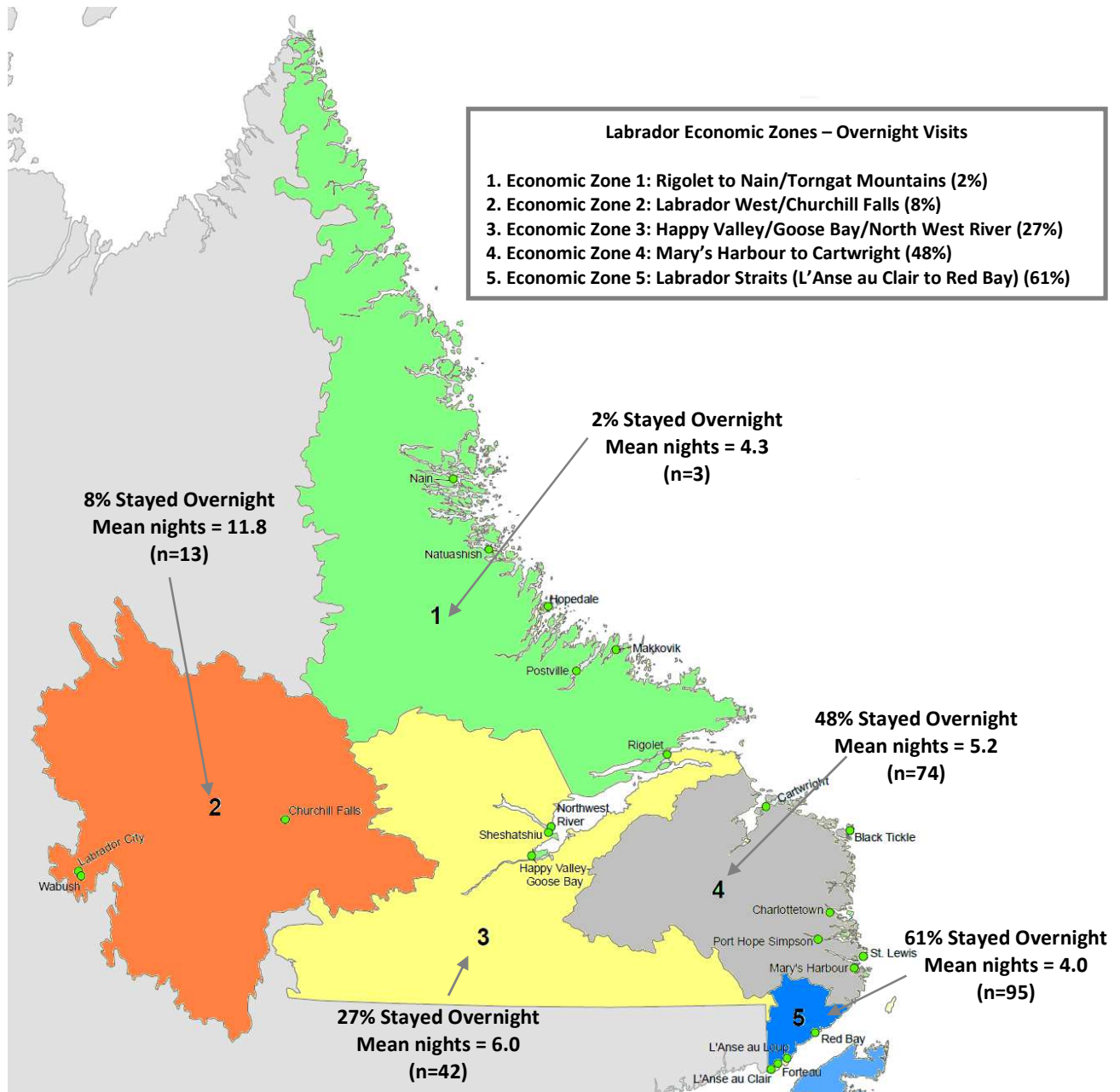
Table 15: Destinations Visited in Labrador and stayed for at least one Overnight
Subset: Respondents exiting via Blanc Sablon Ferry
- % Visiting (Multiple Mentions) -

	Island of Newfoundland Residents n=155	Non-Residents n=255
L’Anse au Clair	23%	35%
Happy Valley-Goose Bay	27%	25%
Red Bay	10%	24%
Labrador City – Wabush	7%	19%
Churchill Falls	3%	13%
Port Hope Simpson	14%	12%
Battle Harbour	10%	9%
Pinware River Provincial Park	1%	9%
Forteau	13%	8%
L’Anse au Loup	9%	8%
Mary’s Harbour	13%	7%
West St. Modeste	12%	7%

In order to provide added insight into the destinations visited within Labrador, the communities were grouped by economic zone. The graphs on the following pages illustrate the percentage of Island and non-resident respondents who visited each economic zone overnight, along with the average number of nights they spent within the economic zone during their trip. If respondents visited more than one destination within a zone, they were included only once in the calculation of the percentage of respondents visiting that zone. Only respondents who exited Labrador via the Blanc Sablon ferry are included in this analysis.

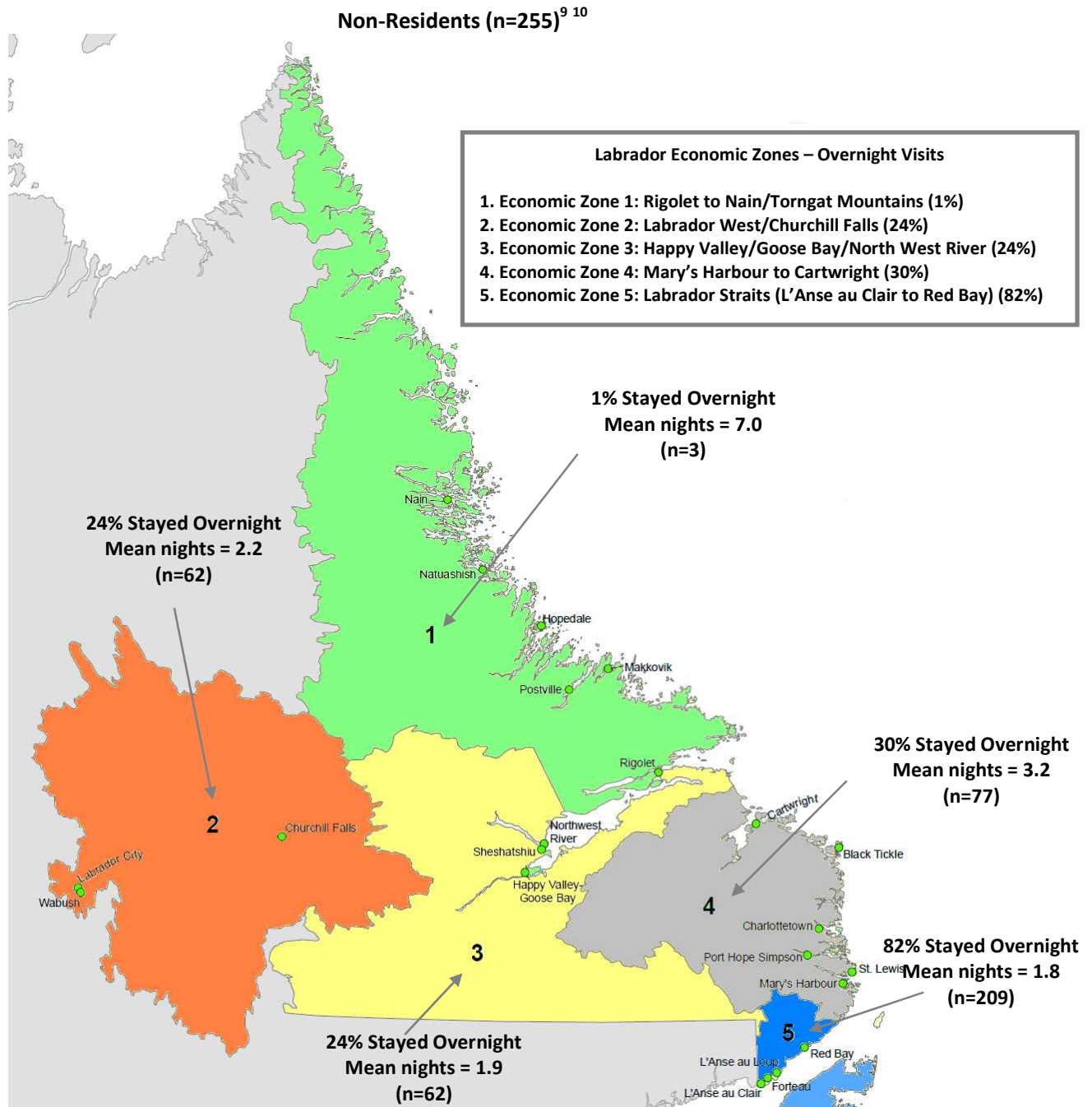
Given the survey methodology, it is not a surprise that both Island respondents and non-residents were most likely to stay overnight in Economic Zone 5, with over four in five non-resident respondents doing so compared to three in five Island respondents. However, while non-residents stayed only 1.8 nights on average, Island residents stayed over twice as long, spending an average of 4 nights in this region. This is also not a surprise given that one- and two night trips were much more common among non-resident respondents (56% compared to 27%).

Newfoundland Residents (n=155)^{7 8}



⁷ Percentage of respondent overnight visits is not additive across Economic Zones as respondents could have had an overnight visit to more than one zone.

⁸ Percentages reflect respondents who stayed overnight and who exited Labrador via the Blanc Sablon Ferry only



⁹ Percentage of respondent overnight visits is not additive across Economic Zones as respondents could have had an overnight visit to more than one zone.

¹⁰ Percentages reflect travellers who exited Labrador via the Blanc Sablon Ferry only

Almost half of Island residents (48%) visited Economic Zone 4, while almost a third of non-resident respondents also spent at least one overnight there, with the average number of nights increasing for both segments – to 5.2 nights for Island residents and 3.2 for non-residents.

Non-residents were significantly more likely to have visited Economic Zone 2 (24%), spending an average of 2.2 nights there. This is likely related to the fact that a quarter of non-resident respondents indicated that they completed the entire length of the TLH between Quebec and Blanc Sablon. While only 8% of Island residents stayed overnight in Economic Zone 2, they stayed an average of 11.8 nights – the longest stay of any traveller segment in any region.

Economic Zone 1 was the least visited zone, with only 2% of Island resident and 1% of non-resident respondents respectively indicating that they stayed there overnight. However, non-residents spent more time in this area with 7 nights on average compared to 4.3 nights for Island residents.

Section 5: Labrador Trips – Summer 2011

The 2011 Labrador Travel Survey focused on trips taken during the survey period. This section reports on the types of accommodations respondents stayed in as well as the activities they participated in and attractions they visited. It also provides a look at travellers’ overall trip satisfaction. Only Island residents and non-residents were asked to participate in this section of the survey.

5.1 Accommodation Types

In terms of the types of accommodations used by respondents, there was significant variation between the two segments. Hotels/Motels were by far the most frequently used type of accommodation among both segments of respondents while travelling in Labrador. Four in ten non-resident and 45% of Island residents stayed at a hotel or motel for at least one night. As well, Newfoundland residents were significantly more likely to stay with relatives or in a private cabin/cottage during their trip, while non-residents were more likely to use a Bed and Breakfast (B & B), commercial campgrounds/trailer parks, Provincial Parks, and other types of accommodations (including wilderness, roadside camping, other types of private properties). Significant differences between Island respondents and non-resident respondents are highlighted in the table.

Table 16: Accommodations Used

	Newfoundland Residents n=166	Non-Residents n=300
Hotels/Motels	45%	40%
Bed and Breakfasts/Country Inns	7%	23%
Commercial campgrounds/trailer parks	4%	22%
Provincial Parks (Camping)	2%	15%
Commercial cabins/cottages	13%	10%
Houses of relatives	44%	5%
Houses of friends	8%	4%
Private cabins/cottages	11%	2%
National Parks (Camping)	0%	2%
Commercial outfitting camps	1%	1%
Other	8%	21%

Overall, Island resident respondents were almost as likely to stay in paid roofed accommodations for at least one night of their trip as they were to stay in unpaid accommodations, with almost three in five respondents indicating that they overnighted with relatives, friends or at private cottages. Non-residents, on the other hand, were twice as likely to have stayed in paid roofed accommodations than to have camped at provincial / national park or commercial campgrounds. Only 5% of Island residents stayed at campgrounds while only 10% of non-residents stayed in unpaid accommodations.

Table 17: Accommodations Used

	Newfoundland Residents n=166	Non-Residents n=300
Paid roofed accommodations (Hotels/motels, B&Bs, commercial cabins)	55%	62%
Other paid accommodations (Commercial campgrounds, provincial / national parks camping)	5%	31%
Unpaid accommodations (Houses of relatives, houses of friends, private cabins)	60%	10%

Due to the small number of respondents, the average length of stay at each accommodation type is reported at the overall level. On average, travellers to Labrador spent the most amount of time staying with friends and family or at private cabins and cottages (7.2 nights). Travellers tended to spend less time in commercial accommodations including campgrounds and provincial/national parks (2.7 nights) and hotels/motels, B&Bs or commercial cabins (2.4 nights). There were no differences in the average number of nights spent between Island residents and non-residents for the three collapsed categories.

Table 18: Mean Length of Stay by Accommodation Type

	Total	
	n	Mean
Unpaid accommodations (Houses of relatives, houses of friends, private cabins)	130	7.2
Other paid accommodations (Commercial campgrounds, provincial / national parks camping)	101	2.7
Paid roofed accommodations (Hotels/motels, B&Bs, commercial cabins)	277	2.4
Other	82	6.5

The types of accommodation respondents used during their trip varied somewhat when linked to the main purpose. Those visiting friends and family were significantly more likely to have stayed at houses of friends and relatives. Conversely, those travelling for a convention or business as well as those travelling for vacation or pleasure were more likely to overnight at paid roofed accommodations, with vacation travellers being by far the most likely to have stayed at a campground.

Table 19: Accommodation Type by Main Purpose

	Convention or Business/work-related	Vacation or pleasure	Visiting friends or relatives	Fishing	Other
Total (n)	44	341	72	31	11
Paid roofed accommodations (Hotels/motels, B&Bs, commercial cabins)	66%	59%	32%	58%	36%
Unpaid accommodations (Houses of relatives, houses of friends, private cabins)	20%	12%	82%	45%	73%
Other paid accommodations (Commercial campgrounds, provincial / national parks camping)	7%	26%	4%	10%	0%
Other	27%	18%	3%	26%	0%

5.2 Trip Activities and Motivators

Respondents were asked to indicate what tourism-related activities they or other members of their travel party participated in while in Labrador as well as whether the activity was a prime motivator for their summer trip to Labrador.

Newfoundland Residents

Among Island residents of the province, scenic touring and pleasure walking were the top two activities for travellers visiting Labrador. Approximately one-half of these travellers participated in these activities. These activities were by far the most popular, with scenic touring also being the top prime trip motivator for a significant number of respondents – 15% – compared to other activities. Iceberg viewing, fishing (other than a guided trip) and wildlife viewing round out the top five activities among Island residents. Participating in guided tours, all terrain vehicle (ATV) touring and golfing were niche activities for only a small number of Island residents.

Outside of scenic touring and fishing, other trip motivators for Island residents were numerous, implying that these respondents came to visit Labrador for a variety of activities.

Table 20: Trip Activities
Subset: Newfoundland Residents

	Activities n=206	Prime Motivator n=206
Scenic touring	50%	15%
Pleasure walking in/around communities	48%	3%
Iceberg viewing	34%	4%
Fishing (other than guided trip)	30%	14%
Wildlife viewing	20%	2%
Whale watching	19%	3%
Berry picking	16%	3%
Trail hiking	16%	2%
Bird watching	13%	2%
Hiking in wilderness areas	12%	2%
Visit a Provincial Park	11%	2%
Sightseeing boat tour	10%	2%
Guided tours	7%	2%
All Terrain Vehicle (ATV) touring	5%	1%
Golfing	3%	0%

The percentage of respondents who reported Iceberg viewing as one of their activities was likely impacted by the fact that the Petermann Ice Island was off the coast of Labrador during a large part of the survey period.

Non-Residents

A greater percentage of non-residents participated in activities compared to Island travellers. Over three quarters mentioned scenic touring while over one half did some pleasure walking. Iceberg viewing, wildlife viewing and visiting a Provincial Park were other popular activities among these respondents. A smaller portion of non-resident respondents also engaged in guided fishing trips, botany and geological tours – activities that were of much less interest to Island residents.

While prime motivators also varied among non-residents, they were more distinct and garnered a greater “followship”. Over one half of non-resident travellers reported that scenic touring was a prime motivator for their trip indicating this is a key asset for the region for attracting non-resident visitors. Sixteen percent came specifically to view icebergs – not surprising as the Petermann Ice Island was visible from the shores of Labrador during much of the survey period. Wildlife viewing and pleasure walking were other draws for non-resident respondents while a slightly smaller percentage were attracted by the hiking opportunities and whale watching or came to visit a Provincial Park. Fishing, including guided fishing trip, also motivated a number of non-resident respondents to visit Labrador.

**Table 21: Trip Activities
Subset: Non-Residents**

	Activities n=361	Prime Motivator N=361
Scenic touring	78%	54%
Pleasure walking in/around communities	53%	10%
Iceberg viewing	47%	16%
Wildlife viewing	30%	11%
Visit a Provincial Park	27%	7%
Trail hiking	25%	8%
Whale watching	22%	7%
Bird watching	20%	5%
Hiking in wilderness areas	18%	6%
Sightseeing boat tour	16%	3%
Guided tours	11%	1%
Fishing (other than guided trip)	9%	6%
Berry picking	9%	1%
Fishing (guided trip)	4%	4%
Botany tours	4%	2%
Geological tour	4%	1%

The percentage of respondents who reported Iceberg viewing as one of their activities was likely impacted by the fact that the Petermann Ice Island was off the coast of Labrador during a large part of the survey period.

When examining trip activities for Newfoundland residents and non-residents by trip purpose, a number of interesting trends emerged:

- Visitors travelling for vacation or pleasure were much more likely to partake in a variety of activities including scenic touring, iceberg viewing, wildlife viewing, hiking and visiting a

Provincial Park. More than half of visitors travelling for vacation or pleasure cited scenic touring as a prime motivator for their trip.

- Similar to those who came to Labrador for fishing, travellers who came to Labrador on a work-related trip were the least likely to partake in activities offered in Labrador but two in five engaged in scenic touring and pleasure walking in/around communities while a somewhat smaller percentage found time for fishing and iceberg viewing.
- More than half of respondents visiting friends and relatives participated in many of the top activities such as scenic touring and pleasure walking but with the incidence slightly less than among visitors travelling for vacation or pleasure. Furthermore, these respondents also engaged more in fishing, berry picking and ATV touring than those who travelled for business or vacation/pleasure.

Table 22: Trip Activities by Main Purpose
Subset: Non-Resident and Island Resident Travellers

	Convention and Business/work-related (n=47)	Vacation or pleasure (n=369)	Visiting friends or Relatives (n=79)	Fishing (n=31)	Other (n=11)
Scenic touring	40%	84%	56%	26%	27%
Pleasure walking in/around communities	40%	58%	57%	29%	27%
Iceberg viewing	23%	51%	29%	35%	27%
Wildlife viewing	13%	33%	23%	16%	18%
Trail hiking	13%	28%	13%	6%	0%
Visit a Provincial Park and	9%	28%	6%	16%	0%
Whale watching	13%	25%	22%	10%	9%
Bird watching	9%	21%	13%	10%	18%
Fishing (other than guided trip)	17%	10%	32%	77%	18%
Hiking in wilderness areas	9%	20%	10%	19%	0%
Sightseeing boat tour	15%	16%	9%	10%	0%
Berry picking	2%	13%	18%	10%	9%
Guided tours	6%	13%	3%	0%	0%
Fishing (guided trip)	0%	2%	3%	35%	0%
Geological tour	2%	4%	0%	3%	0%
Botany Tours	4%	4%	1%	0%	9%
All Terrain Vehicle (ATV) touring	2%	1%	8%	3%	9%

5.3 Trip Attractions and Events and Motivators

Travellers were also asked to indicate what places and events they visited during their trip to Labrador.

Newfoundland Residents

Similar to activity participation, Island respondents visited attractions or participated in events to a lesser extent than non-resident respondents. Fifty percent of Newfoundland residents visited craft and gift shops during their Labrador trip – by far the most popular place to go, while just over a quarter of these respondents also went to other shopping places. Among attractions, lighthouses, national and provincial historic sites as well as museums were the most popular. However, outside of national historic sites, places and events were not prime motivators for the vast majority of Island travellers, suggesting that visiting places and events is a secondary activity and seen as something to do while travelling rather than a driving force behind deciding where to visit. But given the variety of motivators for Island travellers to Labrador, it is notable that Labrador’s National Historic Site (Red Bay) and Provincial Historic Site (Point Amour Lighthouse) stand out as prime motivators, cited by 9% and 4% of respondents respectively.

Table 23: Places/Events
Subset: Newfoundland Residents

	Places/Events n=206	Prime Motivator n= 206
Craft/gift shops	50%	3%
Other shopping	27%	1%
Lighthouses	24%	2%
National Historic Sites	23%	9%
Provincial Historic Sites	20%	4%
Museums	19%	3%
Galleries	15%	1%
Visitor Information Centres	14%	2%
Interpretation/Science Centres	13%	2%
Archaeological sites	9%	1%
Other historic sites	9%	1%
Local festivals	9%	1%
Nightclubs	8%	0%
Live performing music presentations	5%	1%
Come Home Year Celebration	5%	2%

Non-Residents

A higher percentage of non-residents visited the majority of tourism places and events compared to travellers from the Island. As more non-residents also indicated “scenic touring” as a prime motivator, this would suggest that non-residents are more likely to visit places and events as part of the “touring experience”.

National Historic Sites was both the top place visited and top prime motivator among the places and events reported by respondents.¹¹ As well, although fewer non-residents reported visits to provincial historic sites compared to national historic sites, these were a prime motivator for 9% of respondents. Given these survey results, it is clear that both national and provincial historic sites are definite tourism assets in Labrador. Craft and gift shops were popular places to go for both Island and non-resident respondents while lighthouses and museums were also a draw among non-residents.

**Table 24: Places/Events
Subset: Non-Residents**

	Places/Events n=361	Prime Motivator n=361
National Historic Sites	59%	23%
Craft/gift shops	57%	4%
Visitor Information Centres	53%	4%
Lighthouses	48%	8%
Museums	41%	8%
Provincial Historic Sites	35%	9%
Interpretation/Science Centres	26%	6%
Galleries	23%	5%
Archaeological sites	20%	5%
Other historic sites	16%	6%
Other shopping	15%	1%
Local festivals	6%	1%
Nightclubs	4%	0%

Main purpose also had a significant impact on places and events that were visited or attended during travellers’ trip to Labrador:

- Travellers visiting for vacation or pleasure were far more likely to take in a variety of events or places throughout Labrador, specifically National and Provincial Historic Sites, Lighthouses, Interpretation/Science Centres, Visitor Information Centres, Museums and Galleries;
- Craft or gift shops was one place that travellers visited consistently regardless of their reason for visiting Labrador suggesting these stores have a broad appeal;
- Very few travellers visiting friends and relatives or travelling for work took in a gallery, Interpretation Centre or Visitor Information Centre; and
- Travellers visiting friends and relatives were the most likely to visit a local festival, see a live performing music presentation or do shopping (other than in craft and gift shops).

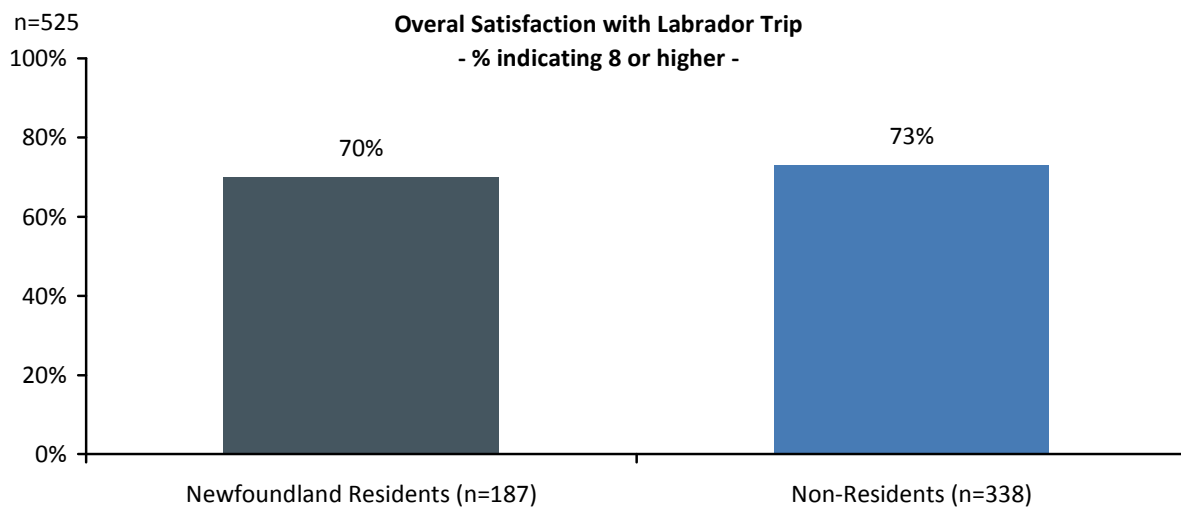
¹¹ Although there is only one National Historic Site in Labrador – Red Bay – it is likely that the results are impacted by visits to Battle Harbour which is a National Historic District.

Table 25: Places and Events by Main Purpose
Subset: Non-Resident and Island Resident Travellers

	Convention and Business/work-related (n=47)	Vacation or pleasure (n=369)	Visiting friends or Relatives (n=79)	Fishing (n=31)	Other (n=11)
Craft shop	45%	61%	57%	39%	36%
National Historic Sites	17%	63%	16%	10%	27%
Lighthouses	21%	50%	22%	19%	18%
Visitor Information Centres	11%	54%	11%	16%	0%
Museums	9%	43%	22%	16%	27%
Provincial Historic Sites	15%	41%	11%	3%	9%
Interpretation/Science Centre	6%	30%	8%	6%	0%
Galleries	9%	27%	9%	3%	9%
Other shopping	19%	18%	34%	13%	9%
Archaeological sites	11%	22%	4%	3%	9%
Other historic sites	11%	17%	10%	0%	0%
Local festivals	6%	6%	14%	3%	9%
Nightclubs	15%	4%	6%	6%	9%
Live performing music presentations	2%	3%	11%	0%	0%
Come Home Year Celebration	0%	2%	8%	3%	0%

5.4 Trip Satisfaction

Overall, trip satisfaction was high among those who completed the survey. More than seven in ten travellers rated overall satisfaction with their Labrador trip an 8 or higher on a 10-point scale. There was no difference in top three scores between non-residents and Newfoundland residents, however, Newfoundland residents were significantly more likely to give a rating of 10 (34%) compared to non-residents (25%). There was also no difference in the mean satisfaction ratings for Island resident respondents (7.9) and non-resident respondents (8.0).

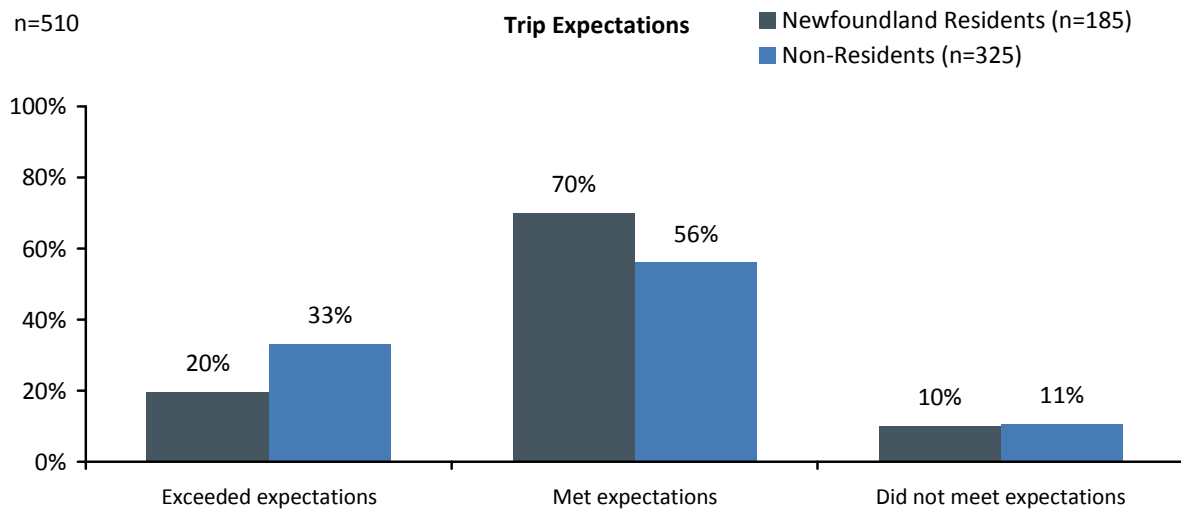


Among non-residents, trip satisfaction was somewhat higher among those respondents who indicated that Labrador was their primary destination (83% rated their satisfaction an 8 or higher) compared to those who indicated that Labrador was part of a trip to the entire province (71% 8 or higher) or part of a trip to Atlantic Canada (71% 8 or higher). Among Island residents satisfaction was significantly higher among those who indicated Labrador was their primary destination (71% 8 or higher) versus those who were visiting Labrador as part of a trip around the entire province (50% 8 or higher).

With respect to trip satisfaction by main purpose, satisfaction levels were comparable among all groups.

Among Island residents and non-residents who rated satisfaction with their Labrador trip a 5 or less (n=74), six in ten indicated the poor road conditions on the TLH as the main reason for their dissatisfaction. Other reasons for respondents’ lower satisfaction levels included too many flies, lack of facilities/infrastructure, and problems with the ferry service/schedule. However, it is important to note that these issues affected only a relatively small number of respondents.

The majority of travellers indicated that their Labrador trip either met or exceeded their expectations. However, while one in three non-residents indicated the trip exceeded their expectations, only one in five Island residents felt the same way. Interestingly, those who travelled for vacation or pleasure were almost twice as likely to report that the Labrador trip exceeded their expectations than those who travelled to visit family and friends.

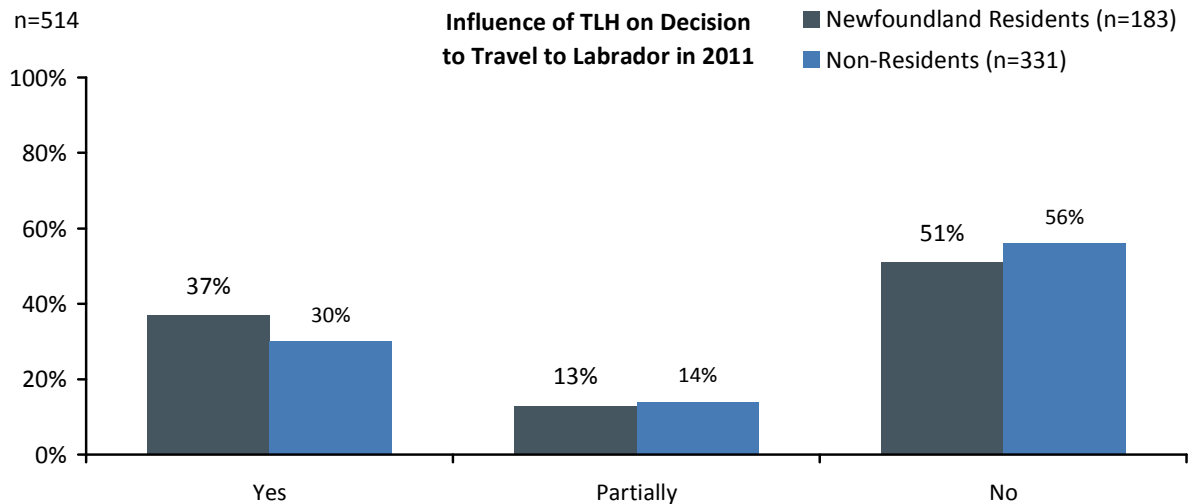


Section 6: Travelling the TLH

This section focuses on the incidence of travelling on the TLH, including sections travelled and what impact the completion of the highway had on respondents' travel plans.

6.1 Impact of TLH on Travel Behaviour

The completion of the TLH had an impact on over 40% of all respondents' decision to travel to Labrador. Thirty-seven percent of Newfoundland residents indicated the highway's completion impacted their decision while an additional 13% said it had a partial influence. Comparatively, three in ten non-residents said it had an impact while 14% indicated a partial impact. For the slight majority of both segments, the completion of the TLH had no impact on their decision to travel to Labrador.



It also appears that many respondents travelled to Labrador well prepared: more than a third (36%) of Newfoundland residents indicated they used information on the TLH to plan their Labrador trip while almost half (47%) of non-residents did so as well.

6.2 Sections Travelled

In order to put respondents' evaluation of their trip experience in context of the extent of their travel on the TLH, all three respondent segments were asked which sections of the TLH they had travelled. The table below provides a summary of the percentage of travellers by origin who travelled on each section of the TLH. The results in this section reflect travellers who exited via a vehicle at the Blanc Sablon ferry terminal only. Results for respondents from Labrador reflect the highway sections which they travelled during the periods June to September 2010 and/or June to September 2011.

Significant differences in the percentage of respondents travelling on each section of the highway by origin are highlighted. A series of detailed maps illustrating this information is provided on the following pages. Given the survey methodology, it is not a surprise that the incidence of travel by Labrador residents along the various highway sections identified is considerably higher than that of Island and non-resident respondents. This also implies that Labrador respondents were well travelled along the TLH and thus knowledgeable to answer the survey questions relating to the TLH.

Table 26: Sections of the TLH Travelled

	Labrador Residents n=148	Newfoundland Residents n=174	Non-Residents n=312
Route 500 between Labrador West and Happy Valley-Goose Bay‡	62%	14%	28%
Route 510 between Happy Valley - Goose Bay and Red Bay‡	91%	53%	44%
Route 516 between Cartwright and Cartwright Junction†	28%	9%	7%
Route 510 between Red Bay and Blanc Sablon	90%	87%	94%
Route 520 to North West River/Sheshatshiu†	35%	14%	11%
Route 514 to Charlottetown/Pinsent Arm†	24%	8%	5%
Route 513 to St. Lewis†	25%	11%	11%

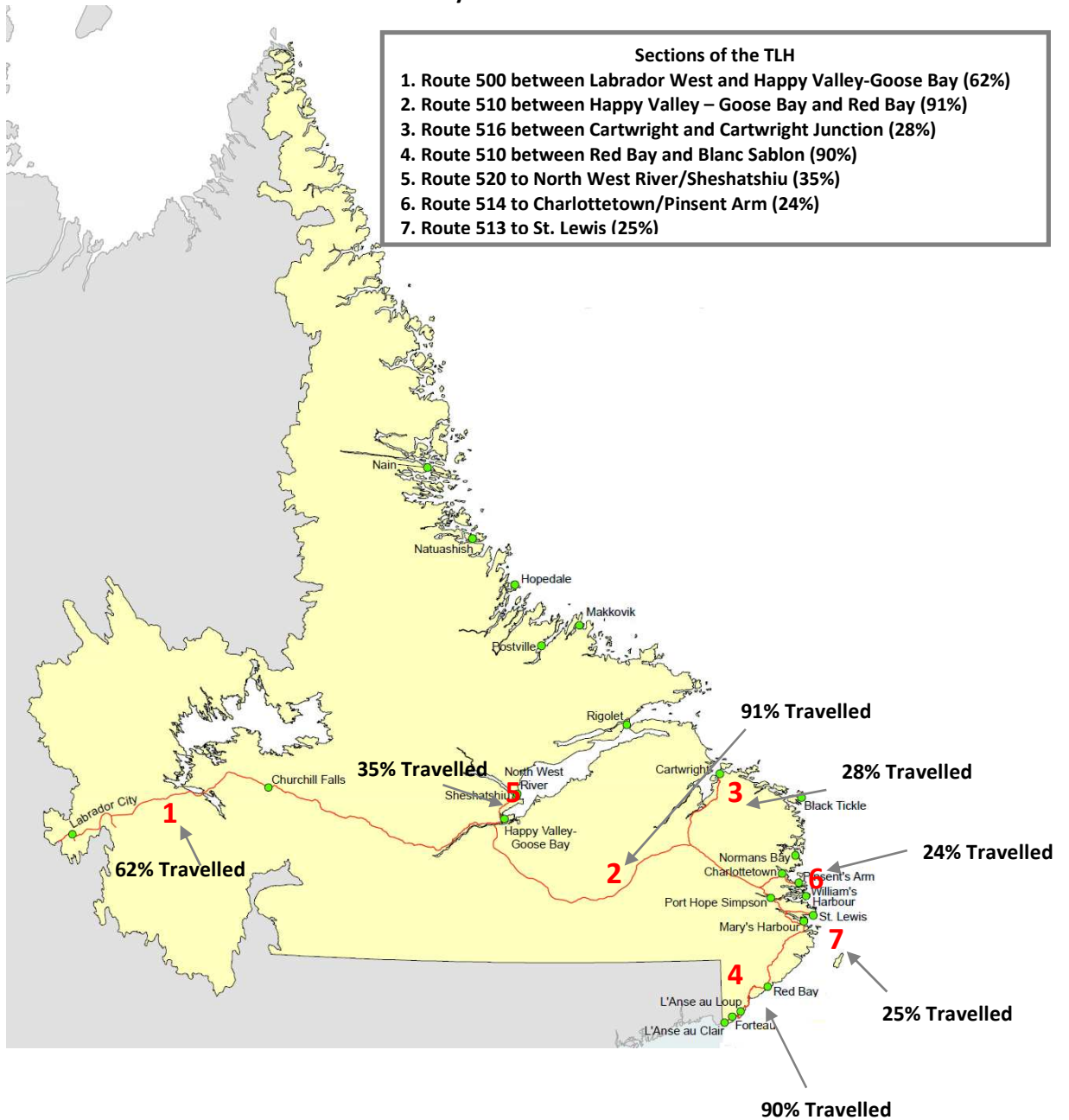
† Labrador residents significantly different from Newfoundland and Non-Residents

‡ All three groups are significantly different

Nearly all respondents of all three origin segments travelled on Route 510 between Red Bay and Blanc Sablon and was the most travelled section of the TLH along the Southwest coast of Labrador. Likely due to the fact that Route 510 between Happy Valley – Goose Bay and Red Bay includes the National Historic District of Battle Harbour, a significant portion of Island residents (53%) and non-residents (44%) also travelled on this section of the highway while almost all Labrador respondents had experienced it. Given the fact that a quarter of non-resident respondents travelled the entire TLH between Quebec Route 389 and Blanc Sablon, it is not surprising that almost three in ten non-residents reported to have travelled Route 500 between Labrador West and Happy-Valley Goose Bay while only small number of Island residents did so.

While only a smaller proportion of Island and non-resident respondents indicated that they travelled on other routes (513, 514, 516 and 520) – between 5% and 14% - at least one quarter to one third of Labrador respondents travelled along these sections, with Route 520 to North West River (location of the Labrador Interpretation Centre) garnering a good amount of traffic from all three respondent segments.

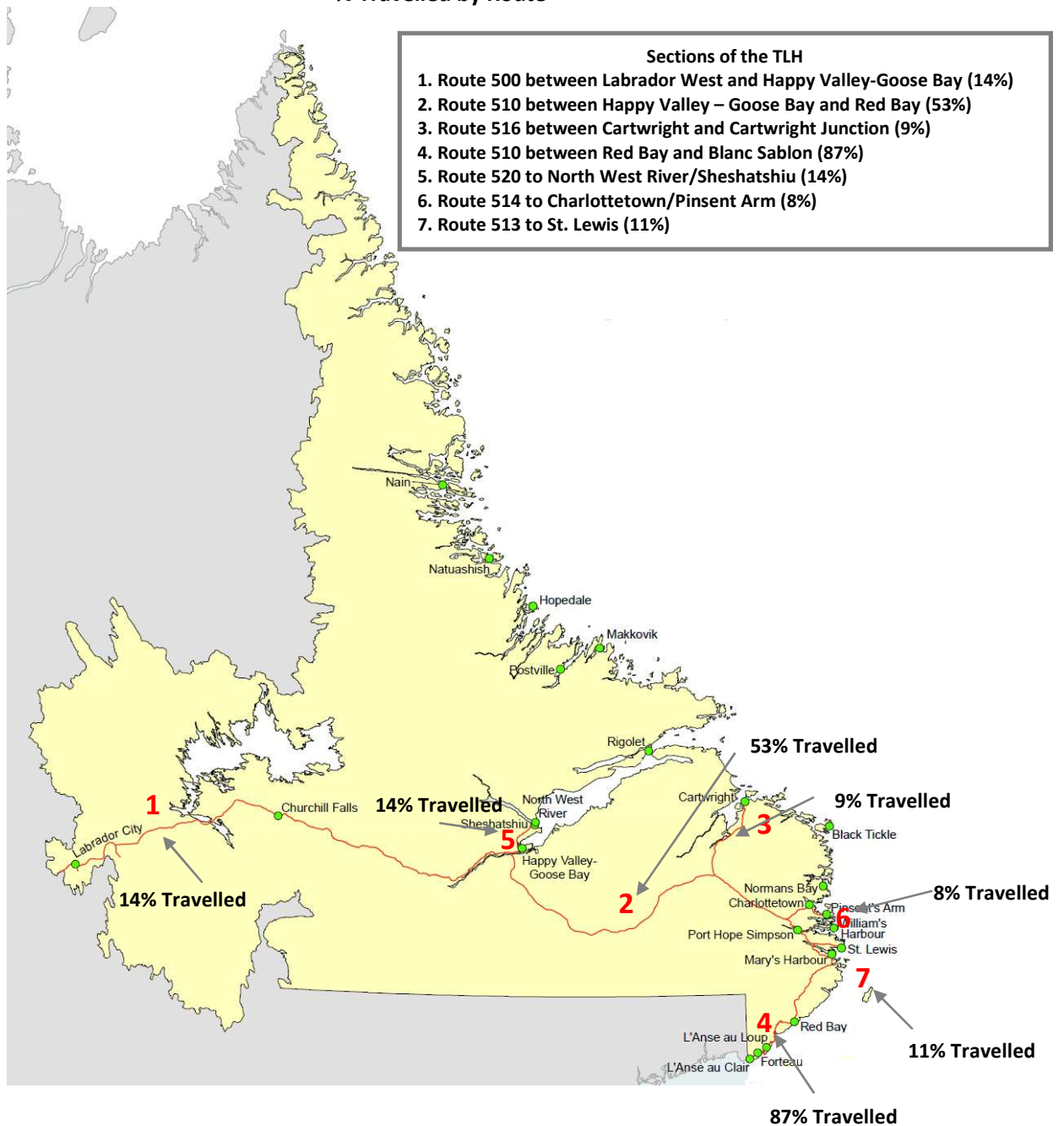
Labrador Residents (n=148)
% Travelled by Route^{12 13}



¹² Percentage of respondents travelling each section of the highway is not additive across sections as respondents could have travelled on more than one section of the highway

¹³ Percentages reflect travellers who exited Labrador via the Blanc Sablon Ferry only

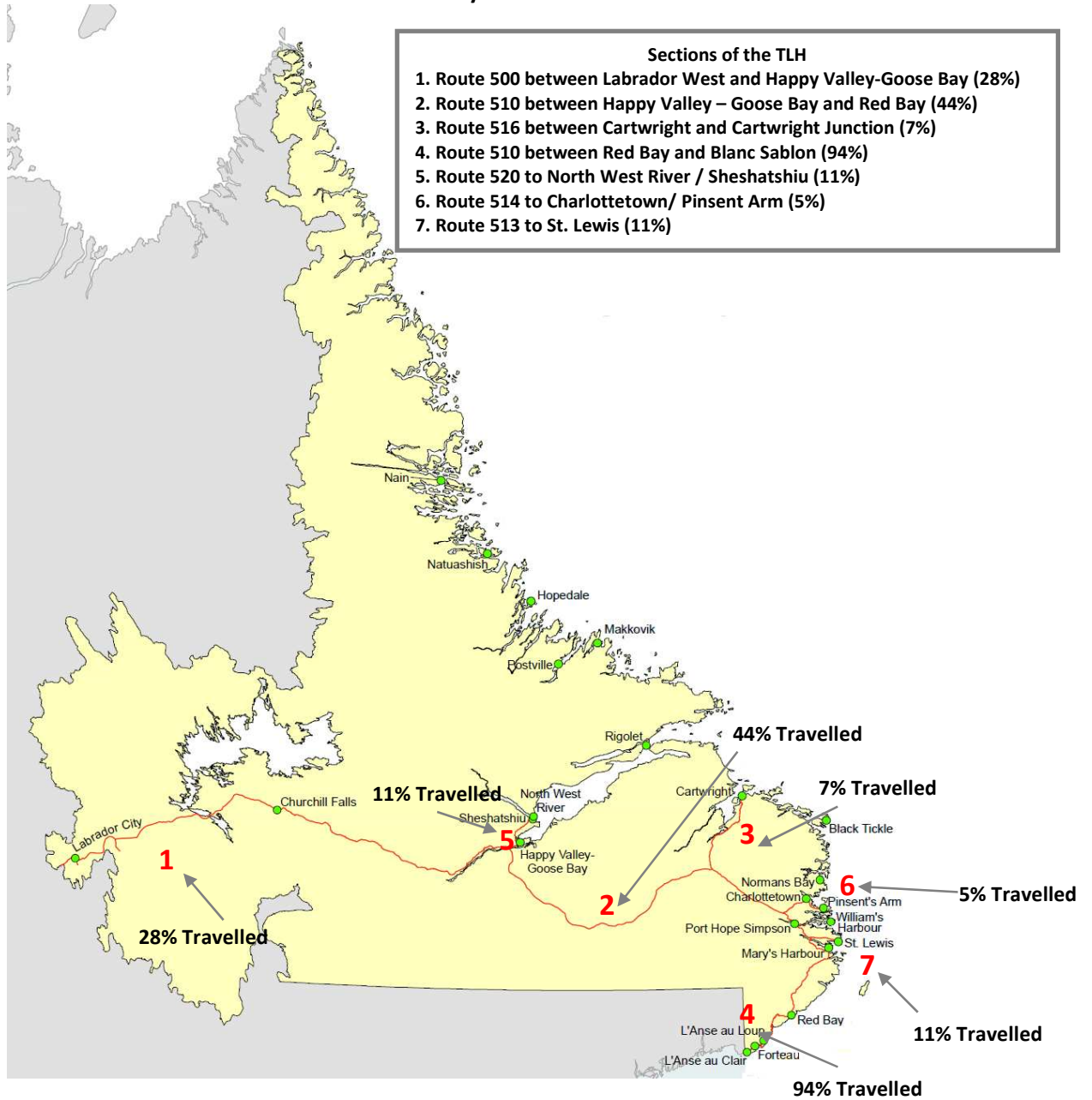
**Newfoundland Residents (n=174)
% Travelled by Route^{14 15}**



¹⁴ Percentage of respondents travelling each section of the highway is not additive across sections as respondents could have travelled on more than one section of the highway

¹⁵ Percentages reflect travellers who exited Labrador via the Blanc Sablon Ferry only

Non-Residents (n=312)
% Travelled by Route^{16 17}



¹⁶ Percentage of respondents travelling each section of the highway is not additive across sections as respondents could have travelled on more than one section of the highway

¹⁷ Percentages reflect travellers who exited Labrador via the Blanc Sablon Ferry only

6.3 Rating the TLH Experience

All three respondent segments were asked to rate their experience travelling on the TLH on a number of key elements using a scale from 1 to 10, where 1 was poor and 10 was excellent. Overall satisfaction with the TLH experience was relatively mediocre with top three scores (percent of respondents rating the experience 8 or higher) ranging from a low of 12% among Labrador resident respondents, to 31% among Island respondents and a high of 43% among non-residents.

In terms of specific elements, respondents from Labrador rated their experience relatively low across the board, likely not a surprise given that for these respondents experiencing the TLH is a quality of life issue. Non-residents, on the other hand, tended to provide significantly higher ratings on the majority of elements. Overall, however, all three segments of respondents agreed in general on the best and worst elements of their experience.

Directional signage received the highest average satisfaction score among all three segments, indicating that local residents as well as visitors to the region saw few issues with it. It is interesting to note that local residents perceived the availability of visitor services worse than Island and non-resident respondents. On the other hand, non-resident visitors did not perceive road conditions as poorly as Island and Labrador residents did. Overall, respondents' satisfaction ratings with various aspects of their experience travelling along the TLH point to issues with the condition/quality of the road, availability of rest stops, emergency services/roadside assistance and mobile phone service.

Table 27: Experience Travelling on the TLH – % rating 8 or higher and mean ratings

	Labrador Residents			Newfoundland Residents			Non-Residents		
	n	Mean	%	n	Mean	%	n	Mean	%
Overall experience‡	177	4.6	12%	177	5.8	31%	290	6.6	43%
Directional signage‡	173	5.5	25%	170	6.2	39%	286	7.2	53%
Promotional signage‡	161	4.4	6%	159	5.5	25%	255	6.4	37%
Availability of service/gas stations	183	4.4	16%	171	5.0	20%	265	6.0	26%
Availability of visitor services†	150	3.1	5%	144	4.1	11%	246	6.0	36%
Availability of public washrooms‡	183	2.7	5%	160	3.7	13%	224	4.7	20%
Condition/quality of the road†	187	2.7	2%	177	3.3	6%	295	4.7	13%
Availability of rest stops†	181	2.6	3%	156	3.4	8%	238	4.1	15%
Availability of emergency services/road side assistance†	149	1.6	1%	109	2.1	3%	89	4.5	26%
Availability of mobile phone service	176	1.3	1%	157	2.0	2%	196	2.7	7%

† Non-residents significantly different from Newfoundland residents and Labrador residents

‡ All three groups are significantly different

In order to provide further details on the TLH experience, top three scores (experience ratings of 8 and higher) were examined for each element of respondents’ experience based on the section of the TLH travelled. It is important to note in this analysis that many respondents travelled on multiple sections of the highway so their responses may be impacted by all the segments they experienced.

This analysis demonstrated a number of key points:

- Overall experience as well as some individual elements were rated the lowest among those who travelled on Route 516 between Cartwright and Cartwright Junction (condition of the roads, promotional signage, availability of service/gas stations, availability of visitor services). Some elements also received low ratings among those who had travelled on Route 514 and Route 513 (promotional signage, availability of visitor services, condition of the roads, availability of rest stops);
- Those who travelled on Route 510 from Red Bay to Blanc Sablon generally had the best experience; however, none of the top three scores surpassed the 50% mark, indicating that even this highly travelled part of the TLH still faces many issues;
- The availability of rest stops, public washrooms, mobile phone service and road side assistance is a major concern on all sections of the TLH;
- Road conditions were perceived as providing a slightly better experience on Routes 500, 510 and 520; however, the top three scores were still extremely low, indicating that only few respondents had an excellent experience.

Table 28: Experience Travelling on the TLH – % rating 8 or higher by Section of the TLH Travelled

	Route 500 Lab West to HV-GB	Route 510 HV-GB to Red Bay	Route 516 Cartwright to Cartwright Junction	Route 510 Red Bay to Blanc Sablon	Route 520 to North West River	Route 514 to Pinsent Arm	Route 513 to St. Lewis
Overall experience	29%	29%	19%	32%	29%	31%	28%
Directional signage	40%	38%	38%	42%	40%	41%	35%
Promotional signage	20%	20%	12%	26%	18%	6%	16%
Availability of service/gas stations	18%	19%	14%	22%	20%	20%	18%
Availability of visitor services	15%	14%	10%	23%	12%	9%	10%
Availability of public washrooms	6%	8%	4%	14%	4%	3%	3%
Availability of rest stops	4%	5%	2%	10%	2%	3%	1%
Availability of emergency services/road side assistance	8%	6%	6%	9%	4%	4%	3%
Condition/quality of the road	10%	9%	2%	8%	8%	4%	6%
Availability of mobile phone service	2%	2%	4%	4%	2%	2%	0%

Note: the number of respondents who provided ratings varies by element as well as by section of the highway travelled

In the survey, respondents were also given the opportunity to provide additional comments about their experience of travelling the TLH. The top concerns expressed by survey participants included the condition of the roads, lack of emergency services, mobile phone coverage and availability of rest stops. These issues are consistent with the low satisfaction ratings these elements received from respondents.

For Labrador residents, the condition of the TLH was mentioned as a major deterrent to the travel experience in Labrador. Concern for their safety and protection of their vehicles was paramount and far outweighed other concerns such as the lack of signage or the need for more rest stops.

Island residents expressed a number of frustrations regarding their experience, with poor road conditions and lack of mobile phone service topping the list of concerns. The need for improved services and more rest stops was more frequently mentioned than it was by Labradorians.

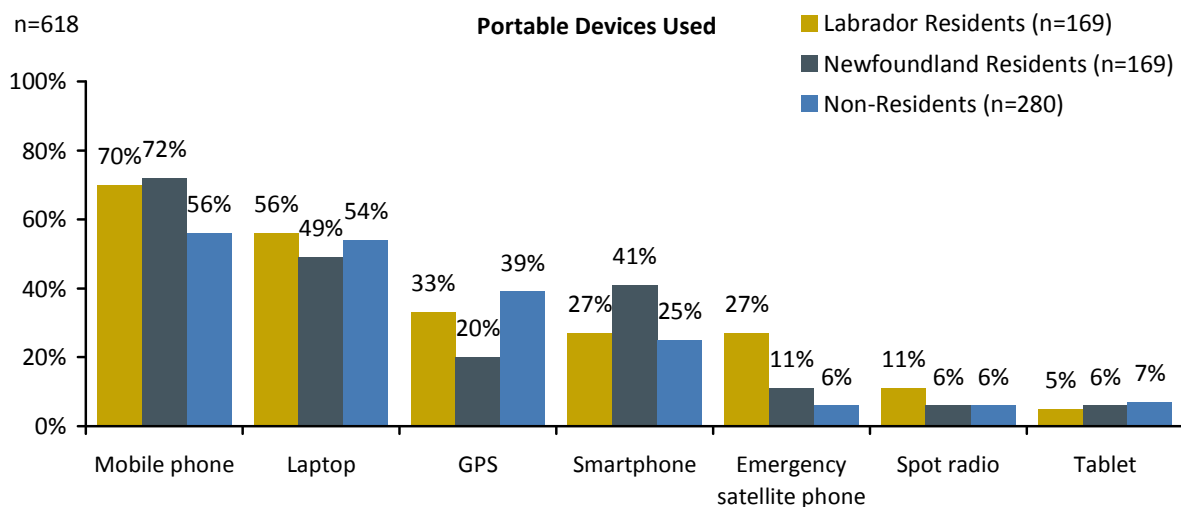
Some respondent ratings may have been impacted by their expectations – previous travel to Labrador or the anticipation of poor road conditions could have turned into a better experience than expected. This is particularly true for Island residents who came prepared – travelling with spare tires and taking advantage of the satellite phone rental service.

Non-residents were much more likely to comment positively on their experience, expressing enjoyment of the beautiful scenery as well as the kindness and helpfulness of the local people. While they also mentioned the poor road conditions and expressing concern for travellers' safety, there were fewer such criticisms compared to Island and Labrador residents. Many expected the roads to be in less than perfect shape given the unpopulated areas and the wilderness but had hoped for more rest and pull-off areas to enjoy the spectacular views, to take photos or to take a break from the gravel roads. Many called for pavement and commented that the lack of shoulders on the highway and its overall construction seemed to make the "wilderness" and the "big land" not as accessible to visitors as they would have liked.

Technology plays an increasing role in today’s traveller experience. Particularly at a destination with large distances between towns and villages as well as attractions and other places of interest, an electronic device is not only regarded as a source of information but also considered a component of a traveller’s “safety net”.

Travellers in Labrador used a number of portable devices. The most common device among all three segments of respondents was a mobile phone while over a quarter of travellers (41% among island residents) also used smart phones highlighting the need for service access. About half of all respondents used laptop computers but only a small number used tablets.

Topping 39% among non-residents, the use of a GPS device was also less common, with Newfoundland residents being the least likely to have used it. At 27%, residents of Labrador were the most likely to carry an emergency satellite phone while only 6% of non-residents and 11% of Island residents did so. The emergency satellite phone program provides phone services to users of the TLH and is available from one end of the highway to the other. The service is free of charge and offers travellers flexible pick-up and drop-off locations. It appears that awareness of this service may be low among Island and non-residents given some of the safety concerns respondents expressed that could have been somewhat mitigated by taking advantage of the emergency satellite phones.



Section 7: Travelling in Labrador – Evaluating the Experience

One of the key objectives of the Labrador Travel Survey was to evaluate the Labrador travel experience. This section highlights what travellers enjoyed and where improvements should be focused.

7.1 Elements of the Travel Experience

Travellers were asked to rate a number of elements of their Labrador travel experience on a scale from 1 to 10 where 1 was poor and 10 was excellent. The table below illustrates the top three scores (% of respondents rating the element 8 or higher) and average ratings for each element. Generally, travellers provided the highest ratings for culture, heritage and attractions, availability of visitor information, activities and recreation as well as the quality of accommodations and food services. Mobile phone coverage, availability of Wi-Fi Hot Spots and access to the Internet received the lowest ratings. Respondents also rated the conditions/quality of the roads at the lower end of the spectrum.

There was significant variation by origin in terms of how travellers rated the elements of their experience. The ratings indicate that non-residents appear satisfied with what is being offered to them in Labrador, with over one half to two thirds of respondents rating culture, heritage and attractions; activities and recreation as well as availability of visitor services as excellent. A slightly smaller number of Island resident respondents appear to have had similar experiences. It also appears that all three segments seem to have had a relatively good experience in terms of the quality of food services and the quality of accommodations, with about half of respondents providing top ratings.

Table 29: Elements of the Labrador Travel Experience – % rating 8 or higher

	Labrador Residents			Newfoundland Residents			Non-Residents		
	n	mean	%	n	mean	%	n	mean	%
Culture, heritage and attractions‡	128	6.2	32%	151	7.5	50%	274	8.0	68%
Activities and recreation†	121	5.6	21%	132	7.2	52%	220	7.4	53%
Availability of visitor information‡	129	5.3	22%	144	6.9	45%	292	7.8	67%
Crafts and retail†	131	6.1	31%	163	7.1	45%	240	6.8	44%
Quality of accommodations	163	6.6	41%	150	7.1	48%	260	7.3	54%
Availability of accommodations	165	6.3	36%	150	6.8	44%	270	6.9	45%
Quality of food services	174	6.7	45%	175	7.1	49%	308	7.1	50%
Availability of food services	182	6.0	32%	180	6.7	37%	312	6.7	40%
Festivals and events	112	5.2	18%	85	6.2	34%	55	5.8	24%
Access to the Internet‡	158	1.9	1%	156	3.5	12%	223	4.9	25%
Availability of Wi-Fi Hot Spots††	122	1.6	1%	105	2.3	3%	156	4.7	24%
Conditions/quality of the roads	187	3.1	4%	198	3.5	8%	335	4.6	12%
Mobile phone coverage	179	1.2	1%	185	2.0	3%	237	2.9	8%

† Labrador residents significantly different from Newfoundland and non-residents

†† Non-Residents significantly different from Labrador residents and Newfoundland residents

‡ All three groups are significantly different

Given that many of these elements of the Labrador travel experience are also part of Labrador residents' every-day life, it is not a surprise that fewer of these respondents rated their experience as excellent compared to Island residents and non-residents who spend only a few days or a few weeks there.

7.2 Most Enjoyable Aspect

Through open-ended questions, respondents were given the opportunity to comment on the most and least enjoyable aspects of their travel in Labrador.

Based on the comments respondents provided, Labrador's scenery/landscape/natural beauty as well as its people and their friendliness are key assets – most enjoyable aspects frequently cited across traveller segments and by far exceeding other mentions. However, there were some differences between these segments: while the scenery and landscape was most enjoyed by half or more respondents in each traveller segment, respondents from Labrador itself enjoyed it to an even greater extent than its visitors. This is likely related to trip purpose, as for many Island residents – one third of whom went to Labrador to visit family and friends – visits with family was their most enjoyable aspect of the trip. Fishing was another aspect that a number of Island residents' enjoyed the most.

Table 30: Most Enjoyable Aspect – Top Mentions

	Labrador Residents n=163	Newfoundland Residents n=176	Non-Residents n=311
Scenery/Landscape/Natural Beauty/Geology†	66%	50%	60%
The people/friendliness††	23%	23%	32%
Peacefulness/Quiet/Relaxed pace/no traffic/not crowded††	2%	3%	8%
Labrador history/historic sites/museums – in general††	1%	3%	8%
Visit family/relatives†	0%	15%	1%
Fishing/Salmon Fishing†	1%	13%	1%
Icebergs†	4%	1%	6%
Wide open spaces/fresh air/vastness/pristine	2%	3%	5%
Wilderness/Outdoor Experience	1%	3%	5%
Wildlife (other than whales) †††	7%	2%	2%

† Newfoundland residents significantly different from Labrador residents and non-residents

†† Non-Residents significantly different from Labrador residents and Newfoundland residents

††† Labrador residents significantly different from Newfoundland residents and non-residents

Respondents from Labrador also appreciated improved road conditions and indicated that they enjoyed the wildlife, icebergs and the small villages and communities, expressing admiration for the wide open spaces and great coastal views as well as finding pleasure in peace and quietness.

Compared to Labrador respondents, Island residents were less descriptive about the scenery, and while Labradorians spoke of the open spaces, tranquility and wildlife and topography, more Island residents

mentioned the discovery of new places and communities in addition to the great scenery and natural beauty. Non-residents also frequently delighted in the great views Labrador has to offer – the

ocean, the rivers, the icebergs, the whales as well as the open spaces and the wilderness. A number of non-resident respondents also took pleasure in Labrador’s history and related attractions, including Grenfell, Red Bay and Battle Harbour. The superlatives used by respondents to describe the most enjoyable aspect of their trip were wide-ranging and emotional, clearly describing the “awe-factor” of the “Big Land”.

7.3 Least Enjoyable Aspect

In terms of the least enjoyable aspect, the poor roads/condition of the TLH was identified by far more respondents than any other issue across all traveller segments, albeit to varying degrees. Nine in ten Labrador residents cited poor road conditions as the least enjoyable part of their trip compared to over two thirds of Newfoundland residents and just one half of non-residents. The only other issue receiving attention by a considerable number of respondents was too many flies among Island and non-residents. The lack of or insufficient cell phone coverage was identified to a lesser extent as the least enjoyable aspect among Labrador and Island residents.

Table 31: Least Enjoyable Aspect – Top Mentions

	Labrador Residents n=179	Newfoundland Residents n=183	Non-Residents n=295
Poor Road Conditions/Trans Labrador Highway‡	91%	69%	50%
Too many flies†	15%	31%	31%
Lack of/insufficient cell phone coverage††	13%	13%	3%
Poor weather††	0%	2%	10%
Food/restaurants quality/availability/variety	1%	3%	4%
Problems with ferry service/scheduling	0%	3%	4%

† Labrador residents significantly different from Newfoundland and non-residents

†† Non-Residents significantly different from Labrador residents and Newfoundland residents

‡ All three groups are significantly different

Respondents from Labrador frequently commented on the gravel and unpaved portions of the highway along with concerns about the potholes encountered in paved portions of the TLH. Given the unpredictable road conditions as well as the lack of rest stops, public washrooms and service stations, in combination with a lack of cell phone coverage, many respondents felt that these are issues of traveller safety. Labradorians also raised concerns over flat tires and other vehicle damage (broken windshields from flying rocks) and becoming stranded, in the very open spaces that they most enjoy. The road from Red Bay to Blanc Sablon and Port Hope Simpson to Blanc Sablon and Red Bay were specifically mentioned by several Labradorians as poor areas of the TLH.

Similar to Labrador residents, Islanders most frequently mentioned the poor, bumpy roads as the least enjoyable aspect of their trip. In addition, a small number Island resident and non-resident respondents saw issues with the food/restaurant services as well as the ferry. For about 10% of non-resident respondents, only the weather was not enjoyable. There were also a number of comments regarding the lack of washroom facilities as well as the lack of a range of more tourist-specific services, including

- Turn-offs and access points;

- Food services, places to eat;
- Signage and information;
- Quality of craft shops (should have more locally made items); and
- Poor ferry reservation services and schedule.

While the condition of the TLH was cited consistently as the least enjoyable aspect of respondents, there was some variation depending on which section of the highway respondents had travelled. The condition of the TLH was the least enjoyable aspect of 85% of those travelling on Route 516 to Cartwright Junction and Route 514 to Pinsent Arm which was the highest among any section of the road. On the other hand, road conditions were cited as the least enjoyable aspect by 65% of those who had travelled on Route 510 between Red Bay and Blanc Sablon, which was the lowest of all sections.

Table 32: Least Enjoyable Aspect by Section of TLH Travelled

	Route 500 Lab West to HV-GB	Route 510 HV-GB to Red Bay	Route 516 to Cartwright Junction	Route 510 Red Bay to Blanc Sablon	Route 520 to North West River	Route 514 to Pinsent Arm	Route 513 to St. Lewis
	n= 220	n= 381	n= 81	n= 560	n= 121	n= 68	n= 97
Poor Road Conditions/Trans Labrador Highway	75%	75%	85%	65%	79%	85%	75%
Too many flies	20%	21%	17%	28%	18%	21%	22%
Lack of/insufficient cell phone coverage	7%	10%	5%	8%	12%	9%	6%
Lack of highway rest stops/scenic views/pullouts	5%	3%	2%	2%	5%	3%	1%
Lack of facilities/services/infrastructure/tourism development	4%	3%	7%	3%	3%	3%	2%
Lack of public washrooms	3%	2%	5%	1%	3%	4%	3%
Lack of service stations/emergency highway services	3%	2%	2%	1%	2%	0%	0%
Lack of signage	2%	1%	1%	1%	2%	0%	0%

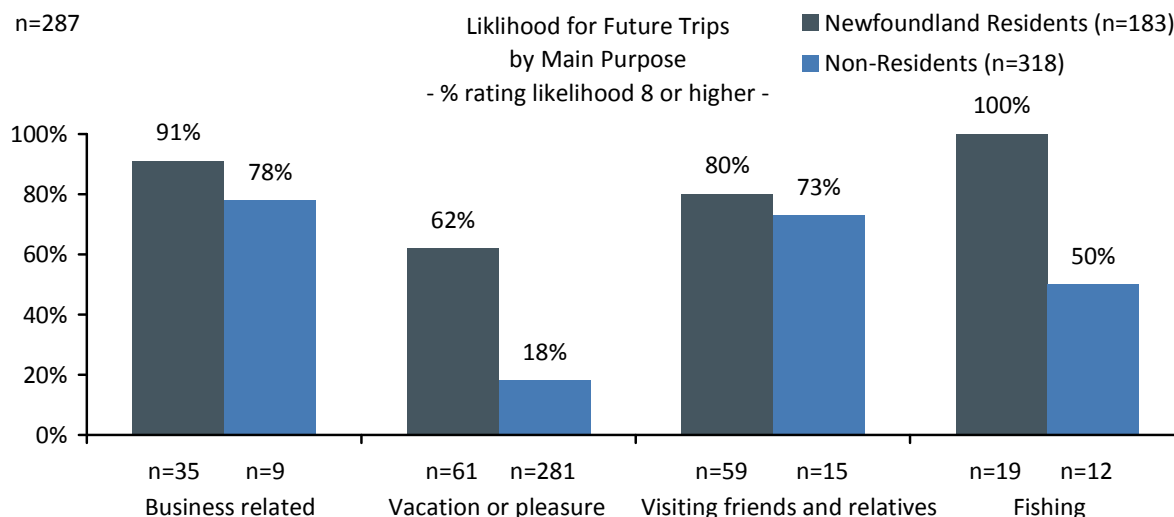
Section 8: Future Travel to Labrador

The section outlines survey results relating to potential future travel to Labrador, including future intent and the potential of special interest travel in Labrador.

8.1 Likelihood for Future Trips¹⁸

Non-residents and respondents from the island portion of the province were asked how likely they would be to take another trip to Labrador in the next 5 years. Almost four in five Newfoundland residents (78%) rated their likelihood 8 or higher on a 10-point scale where 1 was not at all likely and 10 was extremely likely; with 65% indicating that they are extremely likely to return (providing a rating of “10”). However, just about one quarter of non-residents (24%) were highly likely to return, with 15% being extremely likely.

There was significant variation in future intent depending on the main purpose of travellers’ current trips to Labrador. Among Island residents, future intent was relatively high across all trip purposes with those travelling for vacation or pleasure somewhat less likely to take a future trip compared to those travelling for business, to visit friends and relatives and to go fishing. Future intent was also significantly lower among vacation/pleasure travellers from outside Newfoundland and Labrador with just 18% rating their likelihood of a future trip at 8 or higher. Future intent among non-residents who were travelling to visit friends and family was somewhat comparable to Island residents.



¹⁸ Questions on likelihood for future travel were only asked of island residents and non-residents

Future travel intent also varied greatly among respondents depending on whether Labrador was the primary destination of their current trip. Overall, 72% of those who indicated Labrador was their primary destination were highly likely to return in the next 5 years compared to 24% of those travelling to Labrador as part of a trip to the entire province and 14% of those visiting as part of a trip to the Atlantic provinces. This is driven by the fact that a considerable number of Island respondents (86%) reported Labrador as their primary destination and are also the most likely in general to return (78%).

Also, island residents of Newfoundland were equally likely to be planning another trip regardless of whether they originated from St. John’s CMA or other areas of the province. There was a regional difference in future intent for non-residents. Canadian residents were much more likely to go on another trip to Labrador (52% rating 8 or higher) compared to those originating in the United States (21%) or other parts of the world (16%). This would suggest that outside the province Canada offers the best opportunity market for repeat visitors to Labrador.

Those respondents who rated their likelihood to return to Labrador at 6 or higher were asked about the motivating factor for a potential return visit. Not surprisingly, responses varied by respondent origin. Newfoundland residents were by far the most likely to cite visiting family/relatives and fishing while visiting friends was motivation for a smaller number of respondents. Some respondents will be back in Labrador for business reasons. Motivations among the small number of non-residents likely to return to Labrador vary greatly but fishing as well as the desire to see more of Labrador and its scenery stand out.

Table 34: Motivating Factors for Returning – Top Mentions

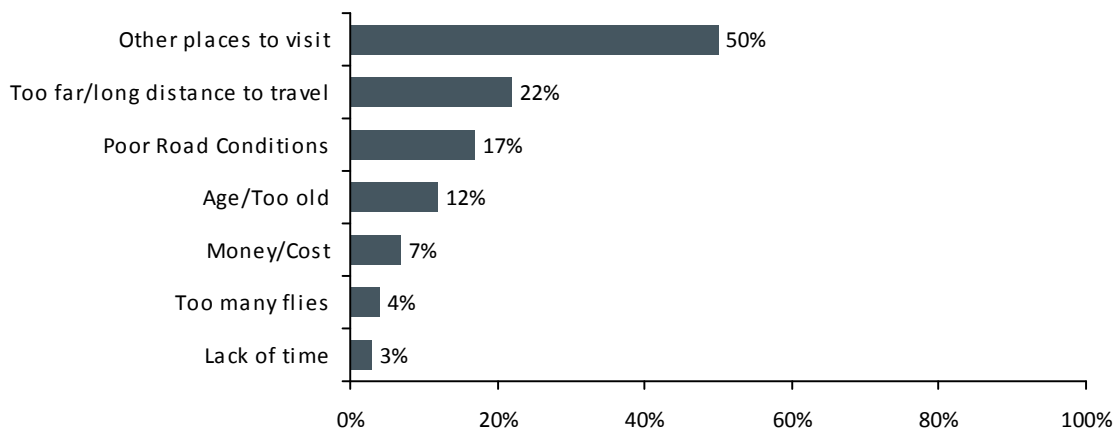
	Newfoundland Residents n=146	Non-Residents n=123
Visit family/relatives	41%	11%
Fishing/Salmon Fishing	30%	18%
See more of Labrador/visit other parts	7%	17%
Scenery/Landscape/Geology	5%	17%
Work	14%	3%
Visit Friends	14%	4%
Paved Roads/Improved Road Conditions	5%	10%
The people/friendliness	1%	12%
Take more time	2%	9%
Wilderness/Outdoor Experience	2%	6%
Hiking/Walking Trails	3%	5%
Hunting	3%	4%
Labrador is/was my home	5%	1%
Icebergs	1%	5%
Travel the Trans Labrador Highway	1%	4%
Everything, love it, great experience	3%	2%

Among non-resident respondents, one half are unlikely to return to Labrador as they want to visit other places while considerably fewer respondents (22%) mentioned that the long distance to travel to Labrador or age (17%) would keep them from coming back. Given the survey methodology, which focused on auto travellers, and the fact that almost two thirds of non-resident respondents were

age 55 or over, this is likely not a surprise. Poor road conditions also played a role for some respondents when considering a return trip; however, the results suggest that while the conditions of the road were a concern among some non-residents, it would not necessarily prevent them from returning to Labrador in future. As previously noted, non-residents in general were also more forgiving about road conditions.

n=184

**Reasons Not Likely to return to Labrador In the Next 5 Years
-Non-Residents-**



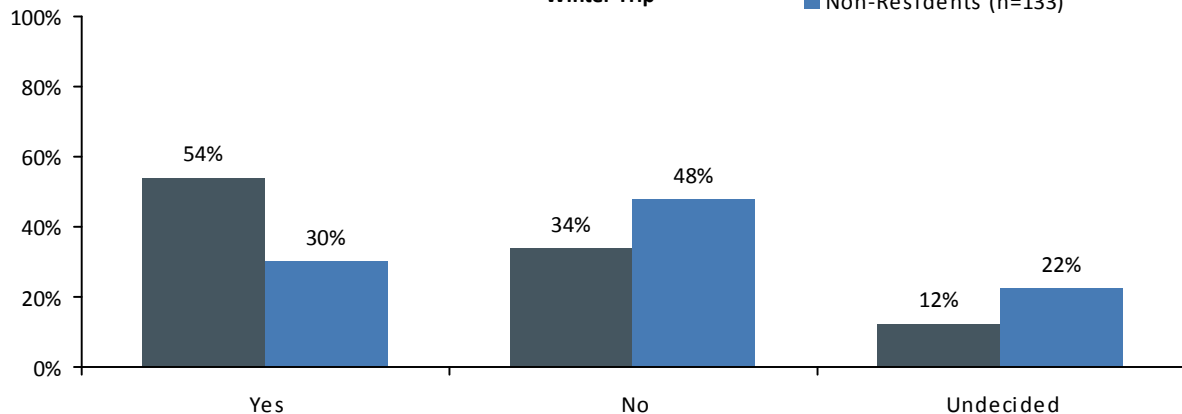
8.2 Interest in Winter Travel

Among those who are likely to return (rating of 6 or higher), just over one half of Newfoundland residents and three in ten non-residents indicated they would consider a winter trip to Labrador. While non-residents trailed Newfoundland travellers on this measure, one-in-five non-residents did indicate they were undecided suggesting there may be some potential among this group for a winter trip in the future. In the context of the total number of respondents, 22% of Island and non-resident respondents were interested in a winter trip to Labrador.

n=287

**Interest in a Labrador
Winter Trip**

■ Newfoundland Residents (n=154)
■ Non-Residents (n=133)



8.3 Special Interest Travel¹⁹

In order to gain insights in the potential of niche or special interest travel in Labrador, respondents were asked about their level of interest in specific forms of tourism. The analysis of results is based on the number of survey participants who provided a response for each of the respective special interest form of travel. It should be noted that for some of the special interest travel categories there was a larger number of survey participants who either did not provide a response or responded “Don’t know”.

The table below summarizes Island residents’ and non-residents’ level of interest in each of the special interest forms of travel as well as the percentage of respondents that are highly or not at all interested in each. Generally, respondents expressed higher levels of interest in cultural tourism, nature-based/wilderness travel and adventure travel. Levels of interest in these forms of travel are somewhat higher among non-resident respondents compared to Island residents. Similarly, both traveller segments are less interested in geo tourism and spiritual tourism. As well, there is a greater level of interest in eco tourism and aboriginal tourism among non-residents. Among Island residents, fishing scored the highest interest rating, with almost three in five respondents expressing that they are highly interested. Non-residents, on the other hand, expressed little interest, with half of these respondents indicating no interest at all. Hunting appears to be a somewhat “polarizing” special interest among Island residents, with 42% of Island residents showing no interest at all and over one third highly interested. While less than one in ten non-residents indicated a high level of interest, that vast majority (78%) indicated no interest at all.

Table 35: Interest in Special Interest Travel

	Newfoundland Residents				Non-Residents			
	n	% not at all interested (rating of 1)	Mean	% 8 or higher	n	% not at all interested (rating of 1)	Mean	% 8 or higher
Cultural tourism	126	8%	6.8	48%	285	4%	7.5	60%
Nature-based/wilderness travel	122	7%	6.9	48%	287	9%	7.3	61%
Fishing	150	21%	6.9	59%	274	50%	3.9	25%
Adventure travel	130	11%	6.6	47%	302	11%	6.9	53%
Eco tourism	108	16%	5.5	30%	265	12%	6.3	42%
Aboriginal tourism	114	24%	4.8	22%	251	16%	5.6	32%
Hunting	125	42%	4.8	34%	249	78%	2.2	8%
Geo tourism	103	32%	4.4	16%	218	39%	4.2	20%
Spiritual tourism	108	54%	2.8	10%	238	72%	2.1	6%

Based on rating on a 1 to 10 point scale, with 1 being “not at all interested” and 10 “very much interested”
Percentages and means exclude ‘no response’ and “Don’t know”

Survey participants were also asked to rate Labrador as a destination for these forms of special interest travel. The low number of respondents who provided a rating for some special interest travel categories is likely an indication that respondents may not have felt knowledgeable enough to provide a rating or

¹⁹ Questions on key activities related to Labrador were only asked of Non-Labradorians

may have been unsure about some of these forms of travel in terms of what exactly they are. This is true for both Newfoundland residents as well as non-resident respondents, with the exception of fishing and hunting where Island residents seemed to have a higher level of certainty to evaluate a part of their home province. The table below summarizes the percentages of Island residents and non-residents who were unable to provide a rating. Special interest travel categories with low response numbers in Table 37 should be interpreted with caution.

Table 36: Rating of Labrador as a vacation/pleasure travel destination for special interest travel - % Don't Know/No response -

	Newfoundland Residents n=206	Non-Residents n=361
Spiritual tourism	74%	82%
Hunting	52%	76%
Geo tourism	70%	75%
Fishing	37%	64%
Aboriginal tourism	61%	61%
Eco tourism	60%	54%
Nature-based/wilderness travel	45%	37%
Adventure travel	44%	33%
Cultural tourism	43%	33%

Both Island and non-resident respondents who did rate Labrador as a destination for various forms of special interest travel, felt that Labrador has much to offer for nature-based/wilderness and adventure travellers. Although non-residents indicated low levels of interest in fishing, they did agree with Island residents that Labrador is a great destination for this activity, with 72% of respondents expressing great appreciation of Labrador's resources. Similar to fishing, hunting ranked comparatively low on the interest scale among both Newfoundland resident and non-resident respondents but both traveller segments rated Labrador comparatively highly as a hunting destination. Survey results also indicate that Labrador has potentially something to offer to those interested in cultural or eco tourism.

Table 37: Rating of Labrador as a vacation/pleasure travel destination for special interest travel - Mean ratings and % rating 8 or higher -

	Newfoundland Residents			Non-Residents		
	n	Mean	%	n	Mean	%
Fishing	129	8.7	83%	129	7.9	72%
Nature-based/wilderness travel	113	8.1	71%	226	8.5	81%
Adventure travel	115	7.5	56%	242	8.0	68%
Hunting	98	7.8	66%	85	6.9	64%
Cultural tourism	117	7.6	60%	242	7.4	57%
Eco tourism	82	6.9	45%	166	7.1	49%
Geo tourism	63	6.8	41%	90	6.7	53%
Aboriginal tourism	81	6.8	51%	142	6.4	42%
Spiritual tourism	53	5.3	19%	63	4.4	21%

Based on ratings on a 1 to 10 point scale, with 1 being "not at all interested" and 10 "very much interested"; Percentages and means exclude 'no response' and "Don't know"

In order to identify whether Labrador is delivering on high interest travel areas, a gap analysis was conducted on the mean scores for each travel segment. It must be noted that the ratings in this analysis are different from those reported in the tables above as this analysis excludes all respondents who were unable to provide a rating of their interest or who were unable to provide a rating of Labrador as a travel destination. Any travellers who were not at all interested in each form of special interest travel were also excluded (i.e. provided a rating of “1” for interest in the special interest travel categories). Results must also be interpreted with caution due to small numbers of respondents.

While Island travellers’ interest in some forms of travel was about average, they believe that Labrador would be a good destination for aboriginal tourism, geo tourism or spiritual tourism. They also indicated that for the more popular special interests, such as hunting, nature-based/wilderness travel and fishing, Labrador would be a destination that would not disappoint. At the other end of the spectrum are cultural tourism, adventure travel and eco tourism where perceptions of Labrador slightly lag the level of interest; however, overall results suggest that Labrador would deliver a positive travel experience.

Table 38: Gap Analysis* – Newfoundland Residents

	Interest		Perceptions of Labrador as a travel destination		Gap
	n	Mean	n	Mean	
Aboriginal tourism	55	6.4	55	6.9	0.5
Geo tourism	45	6.4	45	6.9	0.5
Hunting	64	7.9	64	8.3	0.4
Nature-based/wilderness travel	97	7.8	97	8.2	0.4
Spiritual tourism	30	5.1	30	5.4	0.3
Fishing	107	8.8	107	8.8	0
Cultural tourism	98	7.7	98	7.5	-0.2
Adventure travel	94	7.6	94	7.4	-0.2
Eco tourism	59	7.1	59	6.5	-0.6

***Table excludes respondents who were not at all interested or who were unable to provide an interest or a rating of Labrador as a special interest travel destination**

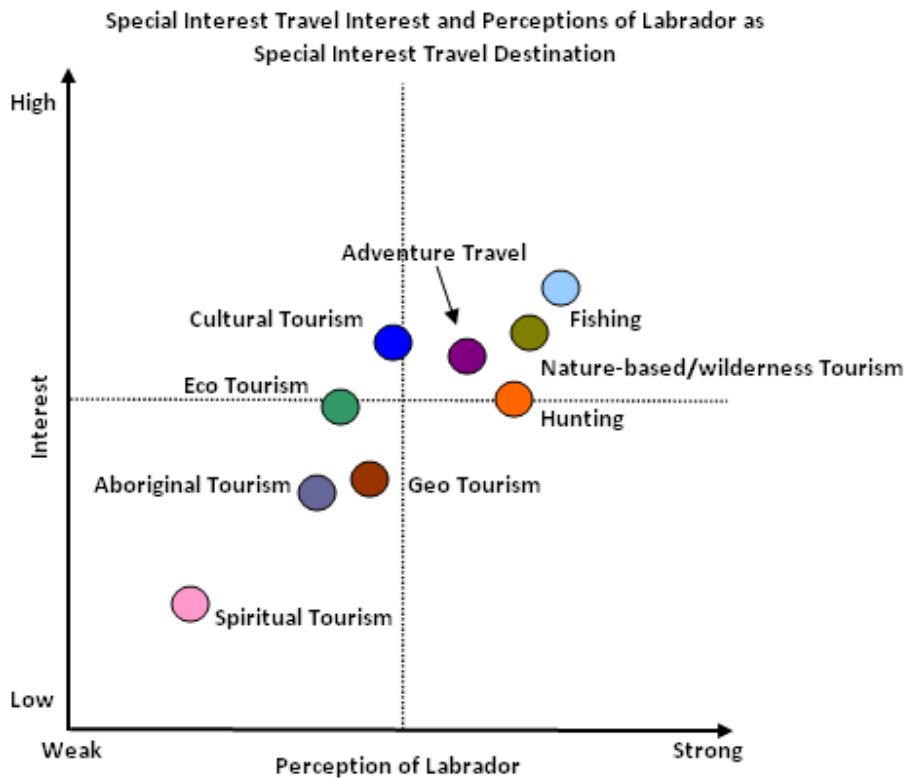
Among non-residents, there was a bigger disparity between the level of interest and the perception of Labrador as a special interest travel destination. Hunting and fishing stand out in particular, indicating that despite lower levels of interest in this type of travel non-resident respondents felt that Labrador would be an excellent destination for anyone looking for this kind of experience. Non-residents also believe that Labrador would not disappoint those travellers looking for nature/wilderness, adventure and geological experiences. The first two in particular – as forms of special travel with a high interest rating – appear to be promising much potential for future tourism development. However, while cultural tourism was also rated as very popular, there was a significant gap in perception. By raising awareness and building knowledge among travellers about what Labrador has to offer in cultural experiences, cultural tourism could play a role in realizing Labrador’s tourism potential in the future.

Table 39: Gap Analysis – Non-Residents

	Interest		Perceptions of Labrador as a travel destination		Gap
	n	Mean	n	Mean	
Hunting	31	6.9	31	8.5	1.6
Fishing	84	7.7	84	8.5	0.8
Nature-based/wilderness travel	207	8.2	207	8.5	0.3
Adventure travel	219	7.9	219	8.2	0.3
Geo tourism	68	7.1	68	7.4	0.3
Aboriginal tourism	117	6.9	117	6.8	-0.1
Eco tourism	147	7.5	147	7.3	-0.2
Spiritual tourism	28	6.6	28	6.1	-0.5
Cultural tourism	225	8.0	225	7.4	-0.6

***Table excludes respondents who were not at all interested or who were unable to provide an interest or a rating of Labrador as a special interest travel destination**

The chart below shows the relationship between the level of interest among all respondents (Island residents and non-residents combined) in special interest travel and their perception of Labrador as a destination for these forms of travel.



The chart illustrates that some areas of high interest – fishing, nature-based/wilderness tourism and adventure travel and to some extent hunting – are those types of travel for which Labrador is likely to

deliver great travel experiences. Cultural tourism, for which there is also a high level of interest, has the potential to become part of this cluster of successful travel experiences, while geo tourism, eco tourism and aboriginal tourism could possibly be developed as niche markets. However, a further study of the concepts, trends and traveller expectations for these forms of tourism is required to fully understand their potential for Labrador.

8.4 Areas for Improvement

Respondents were given the opportunity to provide comments and suggestions on what they feel could be done to improve the Labrador travel experience. Areas for improvements proposed by survey respondents are generally varied but some issues did resonate across the board. Improving road conditions was the top mention among all travellers with almost all Labrador residents (92%) mentioning it compared to just over one-half of non-residents. This suggests that the condition of the TLH has a significant impact on travelling in Labrador. Other suggestions topping respondents' minds included improving cell phone coverage (Labrador/Island residents) and providing more highway rest stops (Labrador residents/non-residents).

Table 40: Areas for Improvement

	Labrador Residents n=180	Newfoundland Residents n=175	Non-Residents n=268
Improve the road conditions/Pave the roads‡	92%	82%	56%
Improve cell phone coverage††	32%	27%	5%
Provide more highway rest stops/scenic views/pullouts †††	12%	3%	12%
Improve ferry service/scheduling/reservation system‡	1%	11%	6%
More service stations/emergency highway services‡	11%	5%	2%
Improve visitor information/better promotion††	1%	3%	10%
Improve signage	6%	3%	7%
Improve facilities/services/infrastructure	4%	2%	7%
Fewer flies/spray for flies†††	1%	9%	3%
Improve food/restaurants	3%	5%	4%
Improve accommodations	1%	3%	3%

†† Non-Residents significantly different from Labrador residents and Newfoundland residents

††† Newfoundland residents significantly different from Labrador residents and non-residents

‡ All three groups are significantly different

While Labrador residents suggested more service stations/emergency highway services, Island residents found that the ferry services need improvement, including a higher frequency of ferry runs, improved reservation services such as online ticketing, better information (e.g. regarding time zones, requirement for advance bookings) and food services. It was also suggested that the ferry run could be better utilized to provide visitor information. Perhaps not a surprise, non-residents were looking for improved visitor information/better promotion and better/additional signage along trails as well as along the roads, particularly to inform about distances, attractions and things to do in an area. A smaller number of Island residents would enjoy Labrador much more with fewer flies and suggested to provide more local and healthier food.

When put in perspective of the sections of the TLH travelled, overall, there was very little difference in the suggestions between respondents who had travelled along the various sections. Improving the road conditions was still the single most advocated change required to make travellers’ Labrador experience more enjoyable. Similarly, improving cell phone coverage was mentioned by approximately one-fifth of travellers across the board.

The number of respondents suggesting more highway rest stops/pull offs and more service stations was higher among those who had travelled along Route 500 between Labrador West and Happy Valley-Goose Bay and Route 520 to North West River. Travellers along Route 500 between Labrador West and Happy Valley-Goose Bay and 510 between Red Bay and Blanc Sablon were slightly more likely to mention a requirement for improved visitor information while more travellers on routes 520, 514 and 513 recommended better signage. Travellers on Route 510 between Red Bay and Blanc Sablon were the most likely to ask for improved ferry services.

Table 41: Areas of Improvement by Section of the TLH Travelled

	Route 500 Lab West to HV-GB	Route 510 HV-GB to Red Bay	Route 516 to Cartwright Junction	Route 510 Red Bay to Blanc Sablon	Route 520 to North West River	Route 514 to Pinsent Arm	Route 513 to St. Lewis
	n= 211	n= 361	n= 76	n= 527	n= 118	n= 66	n= 96
Improve the road conditions	75%	76%	84%	74%	81%	89%	83%
Improve cell phone coverage	18%	22%	20%	18%	20%	27%	18%
Provide more highway rest stops/scenic views/pullouts –	18%	12%	11%	11%	16%	11%	9%
Improve ferry service / reservation system	1%	3%	1%	5%	1%	3%	2%
More service stations / emergency highway services	9%	8%	8%	6%	10%	8%	5%
Improve visitor information	6%	5%	1%	6%	5%	2%	3%
Improve signage	5%	6%	5%	5%	8%	8%	9%
Improve facilities/services	5%	5%	4%	5%	6%	8%	4%
Fewer flies/spray for flies	3%	3%	5%	4%	2%	0%	1%
Improve food/restaurants	4%	4%	4%	4%	6%	3%	3%
Improve accommodations	1%	2%	1%	3%	1%	0%	2%

Summary & Conclusions

Demographic Profile of Travellers to Labrador

1. Non-resident survey respondents had similar demographic characteristics as non-resident travellers in general to the entire province. Non-resident travellers tended to be older and better educated: 67% of non-residents surveyed were 55 years of age or older and 76% were university educated, including 34% with post-graduate degrees. More than two thirds of survey respondents were also affluent, with respondents in all three segments reporting average annual household incomes of \$100,000 or more.
2. Labrador survey participants were skewed younger compared to the other travel segments, with 41% less than 35 years old. The majority of both Labrador and Island residents also graduated from university.
3. Island resident respondents tended to come from two main geographic areas, with 42% from the Island's Western region (including 12% from Corner Brook) and 31% from St. John's CMA. One third of Labrador respondents were from Happy Valley-Goose Bay while almost as many (30%) came from Labrador's southwest region.
4. The majority of non-resident travellers surveyed came from two of the three primary tourism target markets for the Province – Ontario and the United States. Interestingly, the greatest proportion, 33% of all non-residents surveyed, came from the United States, followed by 28% from Ontario. Only 10% of respondents resided in the Maritime Provinces.

Characteristics of Labrador Travel

5. Almost all Labradorians and Islanders surveyed travelled in passenger vehicles as did the majority (70%) of non-residents.
6. Few respondents travelled to Labrador in campers or recreational vehicles/motor homes or with a trailer in tow – with these modes of transportation being used almost exclusively by non-residents (14% and 9% respectively of non-residents used these two modes of travel).
7. The party composition of visitors to Labrador was predominantly a couple or couples with no children (42% of Islanders and 64% of non-residents). Eighteen percent of Islanders travelled as a couple or couples with children.
8. Island resident respondents were highly likely to be repeat visitors to Labrador, with 84% having previously visited Labrador, many of them very recently in 2010 (one third) or 2011 (one third). Almost half of these respondents (44%) indicated that they returned to Labrador because of family while 19% had returned for a business trip and 17% for fishing.

9. The primary reason for travel in Labrador differed depending on the respondents' origin. Almost all non-residents visited Labrador for "vacation and pleasure" – 88%; while just as many Islanders (33%) visited for vacation and pleasure as visited friends and relatives (32%). Nineteen percent of Islanders visited for business purposes and 10% for fishing. Respondents from Labrador indicated that they generally travelled in Labrador for vacation or pleasure (54%) or to visit friends and relatives (15%).
10. More than four in five non-resident respondents visited Labrador as part of a trip to the entire province or to Atlantic Canada while 86% of Island residents chose to go to Labrador as their primary destination. Given this situation, it is not a surprise that the average length of stay for non-residents was shorter compared to Newfoundland residents – 4.1 nights versus 6.8 nights. The majority of non-residents spent one (35%) or two (21%) nights in Labrador while only 27% of Islanders stayed one or two nights, with 30% having stayed eight or more nights.
11. During their trip to Labrador, 60% of Island residents stayed with family and friends for at least one night, while 55% also stayed in commercial fixed-roof accommodations - cabins, hotels/motels or bed and breakfast establishments for at least one night.
12. Almost one third (31%) of non-residents stayed for at least one night in commercial campgrounds and provincial parks while 62% stayed in commercial roofed accommodations. Also, 17% of non-resident respondents used alternative accommodations including wilderness camping, roadside camping, municipal camping or other forms of private properties.
13. The average length of stay in commercial fixed-roof accommodations was 2.4 nights and 2.7 nights in commercial campgrounds and provincial parks.

Activities, Attractions, Events and Prime Motivators for Labrador Travel

14. The most popular activities among all respondents were scenic touring, pleasure walking and iceberg viewing, with non-residents participating in a variety of activities to a greater extent than their Island resident fellow travellers. Survey results indicated that national and provincial historic sites are definite tourism assets in Labrador while lighthouses and museums were also popular places to visit. Visits to craft/gift shops were on the agenda for more than half of all respondents
15. The primary motivators for travel to Labrador were varied among all respondents and were consistent with those for the entire province, including scenic touring, iceberg viewing, wildlife viewing and fishing. Fifty-four percent of non-residents identified scenic touring as a prime motivator while iceberg viewing was a distant second at 16%. National Historic Sites and Provincial Historic Sites were the top motivators in terms of attractions and events, identified by 23% and 9% of non-residents respectively. Among Island residents, scenic touring was a prime motivator for 15% and fishing for 14%.

Travel Experiences on the TLH

16. The completion of the TLH had an impact on over 40% of respondents' decision to travel to Labrador and many respondents travelled to this destination well prepared, with 40% of them using information about the TLH to plan their trip.
17. Given the method of survey distribution, almost all respondents indicated that they had travelled on Route 510 between Red Bay and Blanc Sablon while a fairly large number also travelled on Route 500 between Labrador West and Happy Valley-Goose Bay. One quarter of non-resident respondents travelled the entire length of the TLH from Quebec Route 389 to Blanc Sablon or vice versa. Route 514 to Charlottetown/Pinsent Arm was travelled by the fewest respondents – less than one in ten among both Island residents and non-residents and 24% among Labrador respondents.
18. Overall, respondents rated their experience of travelling the TLH as mediocre, with average ratings ranging from 4.6 out of 10 by Labrador residents to 5.8 for Newfoundland residents and 6.6 for non-residents. The condition/quality of the roads, the availability of emergency services/road side assistance, the availability of rest stops and the availability of cell phone service received the lowest ratings. Generally, non-residents appeared to have had a better experience in all regards travelling along the TLH.

The Labrador Travel Experience

19. The vast majority of visitors to Labrador, both Island residents (70%) and non-residents (73%), were satisfied with their trip. Non-residents were more likely to indicate that the trip exceeded their expectations compared to Island residents (33% versus 20%).
20. Survey results suggest that respondents, in particular non-residents, were mostly satisfied with key aspects of the travel experience, including Labrador's culture, heritage and attractions, activities and recreation, availability of visitor information, the quality of accommodations and the quality of food services. Access to the Internet, availability of Wi-Fi Hot Spots, mobile phone coverage and the quality of the roads were identified by respondents as issues that need improvement.
21. Other information provided by respondents also indicates that poor road conditions and the potential for vehicle damage, in combination with a lack of roadside pull-offs, rest stops and emergency services, are matter of traveller safety that needs to be addressed to improve the Labrador travel experience.
22. For the majority of respondents, the scenery, landscape and natural beauty were the most enjoyable aspect as well as a primary motivator for travel to Labrador and thus should continue to play a significant role in marketing and communications efforts. This was the top tourism asset identified throughout the survey.

Potential of Special Interest Tourism / Winter Travel

23. Opportunities for promoting repeat travel and winter trips rest with Island residents. Based on the survey results, non-residents appeared less likely to take another trip to Labrador, mainly due to the desire to visit other places, the travel distance and age. More than three quarters of Island residents indicated that they are likely to return, mainly to visit family or relatives and to go fishing. More than half of those respondents likely to return would consider a winter trip. Non-residents appear less likely to be interested in a winter trip to Labrador, particularly those who live outside of Canada.
24. Interest among non-resident and Island respondents was limited with respect to some special interest travel experiences such as spiritual tourism, aboriginal and geo tourism. Interest levels were higher for eco tourism and hunting, while nature-based/wilderness travel, culture tourism and adventure tourism appeared to provide “main-stream” opportunities. Fishing is of high interest among Island respondents. At the same time, Labrador appears to be highly regarded as a destination that would deliver great experiences for some special interest travellers, particularly those interested in nature-based/wilderness travel, adventure tourism and fishing and hunting.

Overall Conclusions:

- Survey participants were quite similar to visitors to the province in terms of demographics and travel motivators and thus, from a marketing perspective, could be reached by existing marketing campaigns.
- There is opportunity to encourage repeat travel and winter travel through resident marketing campaigns.
- Fishing is of particular interest to a niche segment on the Island.
- The average length of stay in Labrador by non-residents and Islanders travelling for vacation and pleasure was short at 2.4 nights. Extending the length of stay will require further improvements of the TLH to encourage more extensive travel within Labrador and could also be promoted by providing more comprehensive information to travellers about things to do and see and signage to direct them to attractions and “must-see places”.
- Non-residents visiting Labrador were satisfied with their visit, and it met the expectations of the vast majority, even exceeding the expectations of one in three of these visitors. However, the quality of the TLH is a detractor to travel in Labrador. For residents of Labrador it is as much a safety issue as it is an addition to the pleasure of travel. Non-resident and Island visitors, while relatively less critical of the road, also found it to be a negative impact on their travel experience.

Based on the fact that almost all Island and non-resident respondents travelled between Blanc Sablon and Red Bay but considerably fewer between Red Bay and Happy Valley-Goose Bay, it is possible that perceptions of the quality of the road may have inhibited travel beyond Red Bay, with visitors tending to stop their travel “where the pavement” ended or at least where the “best” section of the TLH was perceived.

As survey results suggested, Labrador already has many tourism assets that attract visitors. However, in order to take full advantage of the majestic scenery and beauty of the “Big Land”, respondents clearly relayed the necessity to provide better travel services along the TLH to further tourism development by enticing them to continue their travel past the Southwest region. With the development and increase in the level of services, accessibility will also increase; however, a balance must be maintained to preserve the uniqueness, image and natural appeal of Labrador.

- One of the key issues for tourism development in Labrador is the definition of a target market and its alignment with existing and potential product and experiences that can be developed. While respondents were most interested in nature-based/wilderness travel, culture, adventure and eco-tourism, specific expectations and experiences sought by these special interest travellers must be explored. There may also be a need to further profile the demographics and special interests of travellers to focus future tourism development for Labrador.

Appendix A: Questionnaire

Labrador Travel Survey

Dear Traveller:

MarketQuest-Omnifacts Research, on behalf of the Department of Tourism, Culture and Recreation and Destination Labrador, is conducting a survey to better understand your needs and improve our services to you -- the traveller. We would appreciate it if you could answer the following questions about your travel in Labrador.

It is important to get feedback from all travellers including residents of Labrador, island residents of the province travelling in Labrador, and non-residents visiting Labrador.

Please be assured that all the information provided in this questionnaire will be treated confidentially in accordance with the provisions of the Access to Information and Protection of Privacy Act of the Province of Newfoundland and Labrador. Your participation is completely voluntary.

Please place the completed questionnaire in the postage paid envelope and deposit it in any Canadian mailbox. Additionally, drop boxes are provided in the Blanc Sablon Ferry terminal, in the gift shop onboard the Blanc Sablon ferry and at the Labrador City Visitor Information Centre.

Non-resident visitors and Island residents: If you received this questionnaire before the end of your current Labrador trip, please do not complete it until you have finished your trip.

THANK YOU

Newfoundland and Labrador Tourism

Section 1: All Travellers

Please read all questions carefully and answer by using the space provided or by checking the appropriate response.

1a. Where do you live?

Labrador

Island of Newfoundland

Other (please specify) _____
(Province/State) (Country)

1b. What is your postal/zip code? _____

2a. What is your point of exit from Labrador?

- Labrador City to Quebec Route 389
- Blanc Sablon via Ferry
- Blanc Sablon Airport
- Wabush Airport
- Goose Bay Airport.....
- Other Airport in Labrador (please specify) _____
- Other (specify) _____
- Not Applicable/Not Exiting.....

2b. What is your date of exit from Labrador? _____ (dd/mm/yyyy)

2c. When did you receive this questionnaire? _____ (dd/mm/yyyy)

2d. Where did you receive this questionnaire?

- Blanc Sablon Ferry
- Labrador City Visitor Information Centre.....
- Happy Valley-Goose Bay Visitor Information Centre.....
- Other (please specify) _____

2e. Is this your first time completing the Labrador Travel Survey in 2011?

- Yes.....
- No.....
- Don't know/unsure.....

3a. Which of the following best describes your vehicle?

Please check only one response.

- Automobile:** Passenger Car/Van/Pickup/Sport Utility (SUV).....
- Automobile with Camper or Trailer in Tow** (including Fifth Wheel Campers)
- Camper:** Recreational Vehicle/Motorhome/Pickup Camper
- Camper with trailer in tow** (e.g. boat/automobile)
- Motorcycle**
- Other** (please specify) _____

3b. Are / were you travelling with any of the following?

Please select **all** responses that apply.

- All Terrain Vehicle (ATV)
- Other recreational vehicle (please specify) _____

3c. Is / was the vehicle you are travelling in rented?

- Yes.....
- No.....

Residents of Labrador, please go to Section 2 below.
Non-resident visitors and residents of the Island of Newfoundland, please go to Section 3 on Page 4

Section 2: Residents of Labrador

For the following questions, please think about **ALL** trips over the past two summers (June to September) that you have taken that included at least one overnight in Labrador. Please exclude any regular/routine trips such as those for commuting to and from work.

4a. Did not travel overnight in Labrador **SKIP TO SECTION 5 (Question 29)**

4b. Typically, what was the **main** reason for these overnight trips? The main reason is the reason without which a trip would not have taken place.

- Convention, Conference or Incentive travel
- Business/work-related
- Vacation or pleasure
- Visiting friends/relatives
- Hunting.....
- Fishing
- Wedding/family reunion
- Medical reasons.....
- Family illness.....
- Death in the family
- Other (please specify) _____

5. Have you travelled on the Trans Labrador Highway as part of an overnight trip during the summer season (June to September) in 2010 or 2011?

Please select all responses that apply.

- Yes - 2010 **CONTINUE**
- Yes - 2011 **CONTINUE**
- No..... **SKIP TO SECTION 4 (Question 22)**

6a. During the summer seasons (June to September) of 2010 and 2011, would you say that you often, sometimes or rarely travelled on portions of the Trans Labrador Highway?

- Often
- Sometimes.....
- Rarely

6b. Along which sections of the Trans Labrador Highway did you travel during the summer seasons of 2010 and 2011?

Please select all responses that apply.

- Route 500 between Labrador West and Happy Valley - Goose Bay.....
- Route 510 between Happy Valley - Goose Bay and Red Bay
- Route 516 between Cartwright and Cartwright Junction
- Route 510 between Red Bay and Blanc Sablon.....
- Route 520 to North West River/Sheshatshiu
- Route 514 to Charlottetown/Pinsent Arm
- Route 513 to St. Lewis.....
- Other (please specify)_____
- Don't know

Residents of Labrador, please go to Section 4 on Page 12.
Non-resident visitors and residents of the Island of Newfoundland, please go to Section 3 below.

Section 3: Non-Resident Visitors and Residents of the Island of Newfoundland

7. What was your point of entry into Labrador?

- Labrador City from Quebec Route 389
- Blanc Sablon via Ferry
- Blanc Sablon Airport
- Wabush Airport
- Goose Bay Airport.....
- Other Airport in Labrador (please specify) _____
- Other (specify) _____

8a. Including yourself, how many people are travelling with you as one travel party on this trip? A travel party is a group of people travelling together and sharing activities, visits and expenditures associated with this trip.

NOTE: If you are travelling as part of motor coach group, sports team or school group, the entire group is not considered to be one travel party.

_____ People

8b. Which of the following best describes your travel party?

Please note that the “Other family members” category includes grandparent(s) with children, single parent or guardian(s) travelling with children, or any other combination of family members.

Please check only one response.

- Alone
- Couple, no children.....
- Couple with children.....
- 2 or more couples, no children.....
- 2 or more couples, with children.....
- Other family members
- Group of friends.....
- Business associates
- Other (please specify)_____

9. What was the **main** reason for this Labrador trip? The main reason is the reason without which this trip would not have taken place.

Please check only one response.

- Convention, Conference or Incentive travel
- Business/work-related
- Vacation or pleasure
- Visiting friends/relatives
- Hunting.....
- Fishing
- Wedding/family reunion
- Medical reasons.....
- Family illness.....
- Death in the family
- Other (please specify) _____

10a. How would you describe this Labrador trip?

If overnight trip, please do not include any nights you spent or plan to spend on the island portion of the Province.

- Day trip..... **CONTINUE**
- Overnight trip of _____ nights..... **SKIP TO QUESTION 11**

10b. For this day trip, what was your primary destination **in Labrador?**

_____ **SKIP TO QUESTION 13**

11. During this trip to Labrador, please indicate which places and/or communities you **visited and stayed at least one overnight.** How many nights did you spend in each place/community?

Please enter the number of nights in the spaces provided.

Place/Community Visited	Nights	Place/Community Visited	Nights
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

12. During this Labrador trip, please indicate **how many nights** your travel party spent in each of the following types of accommodations in Labrador. A travel party is defined as a group of people travelling together and sharing activities, visits and expenditures associated with the trip.

- Hotels/Motels..... _____ Nights
- Commercial cabins/cottages _____ Nights
- Bed and Breakfasts (B&B's)/Country Inns..... _____ Nights
- Houses of relatives..... _____ Nights
- Houses of friends _____ Nights
- Private cabins/cottages..... _____ Nights
- Commercial outfitting camps (Hunting/Fishing/Outdoor Adventure) _____ Nights
- National Parks (Camping) _____ Nights
- Provincial Parks (Camping)..... _____ Nights
- Commercial campgrounds/trailer parks _____ Nights
- Other (please specify) _____ _____ Nights

13. On this trip, was **Labrador** ...

Please check only one response.

- Your primary destination
- Part of a trip to the province of Newfoundland and Labrador
- Part of a trip to Atlantic Canada
- Part of a trip to another destination (please specify) _____

Next, please consider your activities and the activities of those in your travel party during this Labrador trip. Please answer the following activity question based on your personal experiences and also those of other members of your travel party.

14. Please answer parts A and B of the following question.

	A. On this Labrador trip , did you or other members of your travel party participate in any of the following activities?	B. Please indicate if any of the listed activities was a <i>prime</i> motivator for this Labrador trip .
	Yes – participated in	Yes - <i>prime</i> motivator
Scenic touring	<input type="checkbox"/>	<input type="checkbox"/>
Sightseeing boat tour	<input type="checkbox"/>	<input type="checkbox"/>
Whale watching	<input type="checkbox"/>	<input type="checkbox"/>
Iceberg viewing	<input type="checkbox"/>	<input type="checkbox"/>
Bird watching	<input type="checkbox"/>	<input type="checkbox"/>
Wildlife viewing	<input type="checkbox"/>	<input type="checkbox"/>
Pleasure walking in/around communities	<input type="checkbox"/>	<input type="checkbox"/>
Hiking in wilderness areas	<input type="checkbox"/>	<input type="checkbox"/>
Geo-caching	<input type="checkbox"/>	<input type="checkbox"/>
Visiting a Provincial Park and/or Ecological Reserve	<input type="checkbox"/>	<input type="checkbox"/>
Visiting a National Park	<input type="checkbox"/>	<input type="checkbox"/>
Trail hiking	<input type="checkbox"/>	<input type="checkbox"/>
Berry picking	<input type="checkbox"/>	<input type="checkbox"/>
Golfing	<input type="checkbox"/>	<input type="checkbox"/>
Freshwater canoeing/kayaking/rafting	<input type="checkbox"/>	<input type="checkbox"/>
Sea kayaking	<input type="checkbox"/>	<input type="checkbox"/>
All Terrain Vehicle (ATV) touring	<input type="checkbox"/>	<input type="checkbox"/>
Mountain biking	<input type="checkbox"/>	<input type="checkbox"/>
Cycling	<input type="checkbox"/>	<input type="checkbox"/>
Guided tours	<input type="checkbox"/>	<input type="checkbox"/>
Geological tour/fossil observation	<input type="checkbox"/>	<input type="checkbox"/>
Botany tours/plant observation	<input type="checkbox"/>	<input type="checkbox"/>
Fishing (guided trip)	<input type="checkbox"/>	<input type="checkbox"/>
Fishing (other than guided trip)	<input type="checkbox"/>	<input type="checkbox"/>
Hunting – big game (black bear, moose, caribou)	<input type="checkbox"/>	<input type="checkbox"/>
Hunting – small game and birds	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify) _____	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify) _____	<input type="checkbox"/>	<input type="checkbox"/>

The next question relates to places you may have visited, events you may have attended and other types of activities that you may have undertaken during this Labrador trip.

15. Please answer parts A and B of the following question.

	A. On this Labrador trip , did you or other members of your travel party visit, attend or participate in any of the following?	B. Please indicate if any of the listed items was a prime motivator for this Labrador trip .
	Yes – visited/attended	Yes - prime motivator
Galleries/Exhibits	<input type="checkbox"/>	<input type="checkbox"/>
Museums/Archives	<input type="checkbox"/>	<input type="checkbox"/>
National Historic Sites	<input type="checkbox"/>	<input type="checkbox"/>
Provincial Historic Sites	<input type="checkbox"/>	<input type="checkbox"/>
Other historic sites	<input type="checkbox"/>	<input type="checkbox"/>
Archaeological sites	<input type="checkbox"/>	<input type="checkbox"/>
Lighthouses	<input type="checkbox"/>	<input type="checkbox"/>
Interpretation/Science Centres	<input type="checkbox"/>	<input type="checkbox"/>
Visitor Information Centres	<input type="checkbox"/>	<input type="checkbox"/>
Historic event celebration	<input type="checkbox"/>	<input type="checkbox"/>
Local festivals/events	<input type="checkbox"/>	<input type="checkbox"/>
Come Home Year Celebration	<input type="checkbox"/>	<input type="checkbox"/>
Genealogical searches/other research	<input type="checkbox"/>	<input type="checkbox"/>
Sports events/tournaments	<input type="checkbox"/>	<input type="checkbox"/>
Live performing music presentations/concerts	<input type="checkbox"/>	<input type="checkbox"/>
Live performing theatre presentations/plays or dinner theatres	<input type="checkbox"/>	<input type="checkbox"/>
Craft/gift shops	<input type="checkbox"/>	<input type="checkbox"/>
Other shopping	<input type="checkbox"/>	<input type="checkbox"/>
Nightclubs/lounges/pubs	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>

16a. With respect to your personal vacation/pleasure travel, how interested are you in any of the following experiences?

Please indicate your level of interest using a scale from 1 to 10 where **1 is not all interested** and **10 is very much interested**. Please check one response only for each item.

	<u>Not at all interested</u>										<u>Very much interested</u>
	1	2	3	4	5	6	7	8	9	10	Don't Know
Adventure travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cultural tourism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eco tourism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nature-based / wilderness travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aboriginal tourism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hunting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fishing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spiritual tourism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Geo tourism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

16b. How would you rate Labrador as a vacation/pleasure destination for each of the following?

Please rate using a scale from 1 to 10 where **1 is poor** and **10 is excellent**. Please check one response only for each item.

	<u>Poor</u>										<u>Excellent</u>
	1	2	3	4	5	6	7	8	9	10	Don't Know
Adventure travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cultural tourism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eco tourism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nature-based / wilderness travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aboriginal tourism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hunting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fishing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spiritual tourism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Geo tourism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

17a. During your Labrador trip, along which sections of the Trans Labrador Highway did you travel?

Please select ***all*** responses that apply.

- Route 500 between Labrador West and Happy Valley - Goose Bay.....
- Route 510 between Happy Valley - Goose Bay and Red Bay
- Route 516 between Cartwright and Cartwright Junction
- Route 510 between Red Bay and Blanc Sablon.....
- Route 520 to North West River/Sheshatshiu
- Route 514 to Charlottetown/Pinsent Arm
- Route 513 to St. Lewis.....
- Other (please specify) _____
- Don't know

17b. Did the completion of the Trans Labrador Highway influence your decision to travel to Labrador on this trip?

- Yes.....
- Partially
- No.....

17c. Prior to taking this trip to Labrador, did you use information about the Trans Labrador Highway to plan your trip?

- Yes.....
- No.....

18a. Have you visited Labrador before?

- Yes..... **CONTINUE**
- No..... **SKIP TO QUESTION 19a**

18b. When was your most recent visit? _____

Month Year

18c. Why did you come back?

Please indicate your response below.

19a. Overall, how satisfied are you with this Labrador trip?

Please use a scale of 1 to 10, where **1 is not at all satisfied** and **10 is extremely satisfied**.
Please check only one response.

Not at all satisfied	Extremely satisfied
<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> Don't Know	

19b. If you gave a rating of **5 or less** in Question 19a, please indicate your reasons below.

20a. How likely are you to go on another Labrador trip in the next 5 years?

Please use a scale of 1 to 10, where **1 is not at all likely** and **10 is extremely likely**.
Please check only one response.

Not at all Likely	Extremely likely
<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> Don't Know	

20b. If you gave a rating of **5 or less** in Question 20a, please indicate your reasons below.

20c. If you gave a rating of **6 or higher** in Question 20a, what would be the motivating factor for taking another Labrador trip?

20d. If you gave a rating of **6 or higher** in Question 20a, would you consider a Labrador vacation/pleasure trip during the winter?

Yes

No

Undecided.....

21. Thinking about all aspects of your travel experience during this trip, would you say Labrador exceeded your expectations, met your expectations, or did not meet your expectations?

Exceeded expectations

Met expectations

Did not meet expectations

Section 4: All Travellers

22. Please rate the following elements as they relate to **your Labrador travel experience**.

Please use a scale from 1 to 10 where **1 is poor** and **10 is excellent**. Please check one response only for each item.

	<u>Poor</u>										<u>Excellent</u>	
	1	2	3	4	5	6	7	8	9	10	Don't Know	N/A
Conditions/quality of the roads	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mobile phone coverage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to the Internet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of Wi-Fi Hot Spots	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of accommodations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of accommodations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of food services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of food services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Culture, heritage, attractions (museums, historic sites, interpretation centres)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Festivals and events (theatre, music, sports, food)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Crafts and retail (craft shops, galleries, other stores)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of visitor information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activities and recreation (sightseeing, trails, tours, entertainment)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

23. What portable devices did you use while travelling in Labrador?

Please select **all** responses that apply.

- Mobile phone
- Smart phone (e.g. *iPhone, Blackberry*) ...
- Laptop or netbook
- Tablet (e.g. *iPad, Playbook*).....
- Emergency satellite phone.....
- GPS.....
- Spot radio
- Other (specify)_____
- Other (specify)_____

24. How would you rate your experience travelling on the Trans Labrador Highway?

Please rate the following elements using a scale from 1 to 10 where **1 is poor** and **10 is excellent**. Please check one response only for each item.

	<u>Poor</u>									<u>Excellent</u>	
	1	2	3	4	5	6	7	8	9	10	Don't Know
Overall experience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Directional signage (distance, direction)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Promotional signage (attractions, activities)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Condition / quality of the road	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of service/gas stations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of mobile phone service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of emergency services/road side assistance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of public washrooms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of rest stops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of visitor services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

25. Please provide any additional comments you may have with respect to travelling on the Trans Labrador Highway.

26. What would you say is the **most** enjoyable aspect of travelling in Labrador?

27. What would you say is the **least** enjoyable aspect of travelling in Labrador?

28. In your opinion, what could be done to improve the Labrador travel experience?

Section 5: All Travellers

Please provide the following information about yourself and your travel party on this trip.

Please be assured that your responses to these questions will only be used to group responses so that we can make the best use of the information gathered.

29. Including yourself, how many people in your travel party are:

Please enter the number(s).

12 and under	_____	30-34 years	_____	55-64 years	_____
13-17 years	_____	35-39 years	_____	65-74 years	_____
18-24 years	_____	40-44 years	_____	75 and over	_____
25-29 years	_____	45-54 years	_____		

30. What is the **highest level** of education that you have completed?

Please check only **one** response.

High school or less

Community/technical college/vocational training (some or graduated).....

College/university/other post secondary (some or graduated).....

Post graduate (e.g. Masters Degree, Doctorate).....

31. Which of the following categories best corresponds to your **annual household income** before taxes and deductions?

**Please answer in Canadian dollars.
Please check only one response.**

- Less than \$40,000
- \$40,000 to \$69,999
- \$70,000 to \$99,999
- \$100,000 to \$149,999
- \$150,000 or more

32a. From time to time, the Department of Tourism, Culture and Recreation conducts follow-up research with groups of travellers to understand specific issues and travel requirements. Would you be willing to participate in additional research?

Please check only one response.

- Yes..... **CONTINUE**
- No..... **SKIP TO QUESTION 33**

32b. By which of the following methods may we contact you?

Please check all responses that apply.

- Telephone.....
- Mail (postal)
- E-mail/Internet

32c. Please provide your contact information below:

Name: _____
First Name
Last Name

Telephone Number: _____ - _____
 (North America) **Area Code** **Telephone Number**

Telephone: _____ - _____ - _____
 (Other) **Country Code** **Routing Code** **Telephone Number**

E-mail Address: _____

Mailing Address:
Street Address/P.O Box/Route #: _____
Community: _____
Province/State: _____
Country: _____
Postal Code/Zip Code: _____

33. Please provide any additional comments you may have concerning your trip or travel within Labrador

Please place your completed questionnaire in the postage paid envelope provided and deposit in any Canadian mailbox. Questionnaires can also be returned to a drop box at one of the following locations:

- **Blanc Sablon Ferry Terminal**
- **Gift shop onboard the Blanc Sablon ferry**
- **Labrador City Visitor Information Centre**

**THANK YOU FOR YOUR CO-OPERATION.
WE HOPE YOU ENJOYED YOUR TRIP!**



If you have any questions about this survey, please feel free to contact the Department of Tourism, Culture and Recreation:

Toll Free: 1-877-819-3551

Email: labradortravelssurvey@gov.nl.ca

