FOGO ISLAND - CHANGE ISLANDS
THE VISITOR EXPERIENCE
2011 VISITOR SURVEY

Kittiwake Economic Development Corporation (KEDC), Shorefast Foundation &
The Department of Tourism, Culture and Recreation
Executive Summary

In an attempt to diversify the local economy, the communities of Fogo Island and Change Islands have invested heavily in the tourism sector; expanding their assets such as hiking trails, museums, bed and breakfast accommodations and cafes. Working with community groups, organizations, and government departments, the Kittiwake Economic Development Corporation developed an initiative in its 2011 Integrated Business Plan designed to identify, through a visitor survey gaps, demands, and infrastructure requirements for the areas tourism sector.

The survey results indicate that the majority (63%) of the visitors to the Fogo Island/Change Islands area were residents of Newfoundland and Labrador, with half of these originating from communities in the central region of the province.

Over ½ of the visitors travelling to the Fogo Island/Change Islands area for vacation/pleasure reasons while ¼ were in the area to visit family and friends. Not surprisingly non-resident visitors were significantly more likely to report a vacation/pleasure trip than residents of the province.

Word of mouth and recommendations from family and friends were the most popular sources of information used in planning a visit to the Fogo Island/Change Islands area.

The survey results also indicted that almost 60% of the visitors have visited the area on a previous occasion with the level of previous visits, not surprisingly higher among residents of the province.

Over 2/3 (68%) of the visits to the Fogo Island/Change Islands area were for at least one night with 60% reporting a stay of 1-2 nights. The average length of stay for those visiting on an overnight basis was 3.7 nights. Residents of Newfoundland and Labrador and those visiting friends and relatives were more likely to report an overnight stay.

While most survey respondents were generally satisfied with the commercial accommodations located on Fogo Island/Change Islands, “availability of accommodations” was seen as the top area requiring improvement in the future.

Other comments/suggestions offered concerning accommodations included better selection of accommodations, better signage to locate the property, VIC/information centres for accommodation listings and reservations and ability to make online reservations.

There was need for more modern/updated accommodations with a wide range of improvement and services noted. This included larger rooms, better water quality (drinking), availability of internet, WiFi, better lighting, bigger beds, better mattresses, better pillows, better TV service, bigger TV’s, better radio signal, hair dryers in rooms, coffee makers in rooms, bottled water, laundry services and a hot breakfast.
Survey respondents also indicated more camping sites are needed with services and hook-ups required (water, sewer, electrical, dumping stations), better bathroom and shower facilities and noise control/security required at campgrounds.

Ferry transportation is vital to the economy of the area as it is the first and last impression given to all travelers/visitors to the area. Amenities available onboard the ferry, amenities available in the departure are at Farewell and adherence to the schedule was see as the top three areas requiring improvement. Strengths of the ferry service were seen as directional signage at Farewell, value for the money and the overall quality of the service.

Road transportation in the local area is also important to the respondents as quality of the roads was seen as area requiring improvement as well as value for the money as it relates to those visitors (15%) using a rental vehicle.

Other comments/suggestions offered concerning transportation issues included the poor quality of the roads and the need to address the many potholes. The majority of signage suggestions related to the need for more signage to the visitor information centre and to the various sites, trails and attractions on Fogo Island/Change Islands.

By far, the ferry service received the most of the suggestions and included long waiting times at the terminal areas in Farwell and Man O’ War Cove. Suggestions included a “load and go” system, more frequent trips, better schedules in general and to encourage longer stays, and new/better ferries. Other comments included better signage/directions to the departure area, the posting of ticket prices, allowing reservations, manned canteen, and more tourism information onboard and in the departure area and a cleaner vessel, in particular the washrooms.

The issues concerning the rental vehicle experience included the high cost, low availability, not enough/limited kilometers, better selection and better quality of vehicles.

Survey respondents were generally satisfied with the “experiential side” of the Fogo Island/Change Islands visit as the culture/heritage aspects, activities and adventures and overall value for the money was seen as the strengths of the area while availability of visitor information, availability of amenities (washrooms, cell phone coverage, internet, banking) and craft and retail opportunities were seen as the top areas requiring improvement in the future.

Other comments/suggestions offered concerning the visitor experience included a greater availability of information (maps brochures, guides, websites etc) providing a detailed listing of the various activities, sites, trails and attractions on Fogo Island/Change Islands. Better directions/signage to the various attractions, facilities, trails and activities is also required.

There is a need for coffee shops/café, more public washrooms, better cell phone coverage/pay phones, ATM services, internet access (WiFi) and more activities. Additional activities suggested included more live entertainment/music, dinner theatres,
boat tours, historical tours, picnic areas, ATV trail, kayak rentals, bike rentals, better access to crafts/souvenirs and more activities for children.

The need for improved services as noted on the previous page was somewhat tempered by the comment to keep the area original/unspoiled and to leave the island “as is” (i.e. no Tim Horton’s, no McDonalds).

Improved signage to find the trails, need for trail maps, better maintenance (repairs and improvements) required for some trails, easier trails for physically challenged/older visitors and the need for more trails were identified by the survey respondents as ways to improve the product.

Survey respondents were also generally satisfied with food service on the Fogo Island/Change Islands visit as quality and taste, quality of service and serving size was seen as the strengths while availability of eating establishments, variety of food items/menu selection, value for the money and atmosphere were seen as the top areas requiring improvement in the future.

The issues concerning food service included the availability (more needed) of restaurants both in terms of family (lower cost) restaurants but also the need for cafés, coffee shops and sandwich shops. The availability of food service was also needed in the ferry departures areas at Farewell and Man O’ War Cove.

Other suggestions included less fried food, greater menu selection/more variety, more reasonable priced (and availability of) seafood, healthier choices (fruits and vegetables), the availability of an “early morning” breakfast, dining with ocean views, children’s menu, improved service and the requirement for a restaurant guide (places to dine/eat).

Overall travelers/visitors to the Fogo Island/Change Islands area were very positive about their experiences in the area as 84%, 98% and 89% of the visitors respectively were very/mostly satisfied with their visit, very likely/likely to recommend the area and very likely/likely to return to the area for a future visit.

Five categories provided the most enjoyable aspect of the visit and included scenery/sightseeing/landscape, the communities/history/culture/architecture of the area, the friendly and hospitable people, the hiking and walking trails and visiting family and friends.

There was also a lot of positive comments made and included the beauty of the area, the friendly people, overall enjoyment of the visit/great experience, willingness to recommend, wanting to return and wishing they could of stayed longer.

Two categories provided the least enjoyable aspect of the visit and included issues related to ferry schedule and the long wait times associated with boarding the ferry in Farwell and Man O’ War Cove and (of course) the weather.
Those respondents reporting they were very satisfied with their visit to the Fogo Island/Change Islands area rated the attributes related to experiences, accommodations, food service, transportation and heritage and culture higher than average.

Overnight visitors to the area reported higher satisfaction levels than day trippers. This visitor attribute was similar for both first time and repeat visitors.

Those respondents reporting they were very likely to recommend Fogo Island/Change Islands to others rated the attributes related to experiences, accommodations, food service, transportation, heritage and culture higher than average.

Overnight visitors to the area are more likely to recommend the area than day trippers. This visitor attribute was similar for both first time and repeat visitors.

Those respondents reporting they were very likely to return to Fogo Island/Change Islands for a future visit rated the attributes related to experiences, accommodations, food service, and heritage and culture higher than average.

Overnight visitors to the area are more likely to return to the area than day trippers. The proportion of repeat visitors very likely to return was about twice the proportion of first time visitors.
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Fogo Island/Change Islands
Summary Highlights: 2011 Visitor Survey

Introduction/Setting the Scene

Fogo Island is the largest of Newfoundland’s offshore islands, 560 sq. km. in area, while Change Islands is around 50 sq. km. in area (see Figure 1). The island of Fogo has recently undergone an amalgamated process that brought 11 distinct communities into one. The newly formed Town of Fogo Island has a population of around 2,700. Fogo Islanders and Change Islanders have strong attachment to their islands and well-established cultural traditions. The islands comprise a portion of Regional Economic Zone 14, encompassed by the Kittiwake Economic Development Corporation (KEDC).

These islands have traditionally been resource-dependent fishing communities. From the fishing station era in the early 1700s, large mercantile operations and the Fogo Island Co-operative Society; the fishery has been the backbone of the economy.

The Fogo Island-Change Islands community has previously demonstrated great resolve and vision in determining its future. The Fogo Island Improvement Committee saw the creation of the Fogo Island Process that has been modeled world-wide as a community development and communications tool. The Process resulted in the founding of the Fogo Island Co-operative Society in the late 1960’s, which provided the community with a viable option to the provincial Resettlement Program. Change Islands has its own history of resisting re-settlement and defining its own future through past community co-operative activities. However due to a downturn in the fishery over the past number of years; the industry and community are undergoing a number of environmental, social and economic changes.

In an attempt to diversify, the communities have invested heavily in the tourism sector; expanding on assets such as hiking trails, museums, bed and breakfast accommodations, cafes, and so forth. Working with community groups, organizations, and government departments, the Kittiwake Economic Development Corporation developed an initiative in its 2011 Integrated Business Plan designed to identify gaps, demands, and infrastructure requirements in the tourism sector for Fogo Island and Change Islands.
The 2011 Visitor Survey

The Kittiwake Economic Development Corporation (KEDC), in partnership with the Shorefast Foundation and the Department of Tourism, Culture and Recreation through an application to Service Canada under the Canada Summer Job Program conducted a traveller/visitor survey between July 4, 2011 and August 19, 2011.

The purpose of the survey was to better understand the needs of travellers and visitors and to collect information that would provide input and direction for the improvement/enhancement of the tourism experience in the Fogo Island/Change Islands area. This included an examination of patterns in visitation, feedback on experiences, accommodations, food service, transportation, heritage and culture.

Please see the appendix for a copy of the complete questionnaire.

Based on the historical ferry statistics provided by the Department of Transportation and Works and the local knowledge of traffic flow, potential respondents were approached while in the line-up for ferry departing Fogo Island during the afternoon and early evening crossings of the survey period. This approach was used in an attempt to optimize the distribution of questionnaires to “visitors” to the area.

Information provided by the Department of Transportation and Works also indicates that approximately 8,200 vehicles (TEU’s) departed Fogo Island during the survey period.

A total of 621 questionnaires were distributed during the survey period and respondents were directed to return the questionnaires by either passing them back to the student or by placing them in the survey drop-off box located in the passenger lounge on the vessel. An additional 50 questionnaires were placed at the information centre located on Change Islands.

The partnership group received a total of 543 completed questionnaires.

The completed questionnaires were checked, edited and entered into an Excel spreadsheet using a pre-determined set of coding instructions under the direction of the Kittiwake Economic Development Corporation.

Subsequent to the data entry the data was imported into SPSS (Statistical Package for the Social Sciences) by the Department of Tourism, Culture and Recreation. The department also completed with the assistance of the KEDC some basic editing/cleaning to identify any inconsistencies on ranges as well as performed some basic logic checks. Responses were added, deleted or modified as required.

The results/findings presented in the following sections were prepared by the Department of Tourism, Culture and Tourism using SPSS. The charts were developed using Excel.
Origin of Visitors

As can be seen in the following chart, the majority (63.2%) of the visitors/respondents visiting Fogo Island/Change Island during the survey period were residents of Newfoundland and Labrador. The remaining 36.8% were non-residents and included visitors from Mainland Canada (30.6%), the United States (4.5%) and other countries (1.7%).

![Origin of 2011 Visitors: Fogo Island/Change Islands Visitor Survey](chart)

Specifically within Newfoundland and Labrador, residents of Central Newfoundland communities accounted for almost ½ (46%) of the respondents while residents of the Avalon Peninsula represented an additional 1/3 (35%). Residents of communities in Western Newfoundland, Eastern Region (Burin/Bonavista) and Labrador accounted for approximately 13%, 4% and 2% of the respondents respectively.

Over 2/5 (43%) of the respondents from outside Newfoundland and Labrador came from communities in Ontario, while an additional 20% originated from communities in Western Canada. Communities in the Maritimes accounted for 14% of the non-resident respondents while communities in the United States represented 12%.

Main Reason for Trip to Fogo Island/Change Island

As can be seen in chart presented on the next page over ½ (55%) of the respondents visited the Fogo Island/Change Island area for vacation/pleasure reasons while ¼ (25%) were visiting friends and relatives. Other main reasons for travel to the area included business (9%), seasonal residence (4%), wedding/family reunion (2%) and other reasons (4%).
Main Reason for Trip to Fogo Island/Change Island by Origin

As referenced in the following table, the main reason for travel to the Fogo Island and Change Island area varied by the origin of the visitor. Specifically residents of Newfoundland and Labrador were more likely than average to report visiting friends/relatives and business reasons for their trip while non-residents were significantly more likely than average to report vacation/pleasure as their reason for travelling to the Fogo Island/Change Islands area.

<table>
<thead>
<tr>
<th>% of Respondents</th>
<th>Residents of Newfoundland &amp; Labrador</th>
<th>Non-Residents</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation/Pleasure</td>
<td>45.7</td>
<td>71.7</td>
<td>55.4</td>
</tr>
<tr>
<td>Visiting Friends/Relatives</td>
<td>28.2</td>
<td>19.9</td>
<td>25.1</td>
</tr>
<tr>
<td>Business Reasons</td>
<td>13.8</td>
<td>1.6</td>
<td>9.4</td>
</tr>
<tr>
<td>Seasonal Residence</td>
<td>5.5</td>
<td>1.0</td>
<td>3.8</td>
</tr>
<tr>
<td>Wedding/Family Reunion</td>
<td>2.1</td>
<td>2.6</td>
<td>2.3</td>
</tr>
<tr>
<td>Other Reasons</td>
<td>4.6</td>
<td>3.1</td>
<td>4.0</td>
</tr>
</tbody>
</table>
Average Party Size

As can be seen in the following chart, over 2/5 (44%) of the respondents were visiting the Fogo Island/Change Islands area as a party of two with an additional 19% reporting their party size was 4 people. One in eight (13%) of the respondents visiting the area were travelling alone.

The overall average party size for those respondents visiting the Fogo Island/Change Islands area was 3.2 people.

Composition of the Travel Party

As can be seen on the chart presented on the next page, over 1/3 (35%) of the respondents visiting the Fogo Island and Change Islands area reported they were travelling as a couple with no children while an additional 15% were travelling as a couple with children. One in seven (14%) of the parties were visiting the area with other family members while 13% indicated they were visiting the Fogo Island/Change Islands area alone.

As noted in the previous section, the overall average party size for those respondents visiting the Fogo Island/Change Islands area was 3.2 people.
Composition of the Travel Party by Origin

As can be seen in the table presented on the next page, residents of Newfoundland and Labrador are more likely than average to be visiting the Fogo Island/Change Islands area alone or as adult groups accompanied by children. Non-resident travel parties are dominated by couples with no children as over 2/5 (45%) of the parties fall into this group.

Composition of the Travel Party by Main Reason for the Trip

Also as can be seen in the table presented on the next page, respondents travelling to the Fogo Island/Change Islands area for vacation/pleasure reasons were more likely than average to report their party as travelling without children while those visiting friend and relatives were more likely than average to travelling with children as part of their travel group.
<table>
<thead>
<tr>
<th>% of Respondents</th>
<th>Residents of Newfoundland &amp; Labrador</th>
<th>Non-Residents</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alone</td>
<td>16.7</td>
<td>5.6</td>
<td>12.5</td>
</tr>
<tr>
<td>Couple with Children</td>
<td>17.6</td>
<td>10.8</td>
<td>14.9</td>
</tr>
<tr>
<td>Couple with no Children</td>
<td>30.4</td>
<td>44.6</td>
<td>35.4</td>
</tr>
<tr>
<td>Two or more Couples with Children</td>
<td>3.9</td>
<td>3.1</td>
<td>3.5</td>
</tr>
<tr>
<td>Two or more Couples with no Children</td>
<td>7.4</td>
<td>9.7</td>
<td>8.6</td>
</tr>
<tr>
<td>Other Family Members</td>
<td>13.1</td>
<td>15.4</td>
<td>14.0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>% of Respondents</th>
<th>Vacation/Pleasure</th>
<th>Visiting Friends/Relatives*</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alone</td>
<td>2.5</td>
<td>12.7</td>
<td>12.5</td>
</tr>
<tr>
<td>Couple with Children</td>
<td>14.1</td>
<td>19.0</td>
<td>14.9</td>
</tr>
<tr>
<td>Couple with no Children</td>
<td>43.5</td>
<td>30.3</td>
<td>35.4</td>
</tr>
<tr>
<td>Two or more Couples with Children</td>
<td>3.9</td>
<td>2.8</td>
<td>3.5</td>
</tr>
<tr>
<td>Two or more Couples with no Children</td>
<td>13.1</td>
<td>4.9</td>
<td>8.6</td>
</tr>
<tr>
<td>Other Family Members</td>
<td>12.4</td>
<td>21.1</td>
<td>14.0</td>
</tr>
</tbody>
</table>

* includes those respondents visiting Fogo Island/Change Islands for a wedding/family Reunion
Sources of Information

The majority (90%) of the respondents travelling to the Fogo Island/Change Islands area reported they used at least one source of information to plan their trip/visit. On average respondents utilized 1.9 sources.

As can be seen in the following chart, recommendations from family/friends was the most popular source as 38% of the respondents reported this method while an additional 35% used “word of mouth” as an information source.

Other popular sources included the Provincial Tourism website www.newfoundlandandlabrador.com (25%), other websites (22%), the Provincial Travel Guide; “Lost and Found” (19%) and Provincial/regional Visitor Information Centres (15%).

Only 5% of the respondents utilized the Adventure Central Travel Guide in planning their visit/trip to the Fogo Island/Change Islands area.

Other sources of information included social media (Facebook, Twitter, You Tube) at 5% followed by newspapers (4%), magazines (3%), television (3%), radio (3%) and auto associations/clubs (1%).
Previous Visits

Surprisingly almost 3/5 (59%) of the respondents indicated that they have visited the Fogo Island/Change Island area on a previous occasion. Over 4/5 (81%) of the previous visits were in the months of May to September.

Almost ¼ (22%) of the respondents reported a previous visit sometime during the current year (2011) while almost 1/3 (32%) reported a previous visit during 2010. One quarter of the respondents (25%) reported they visited the Fogo Island/Change Islands area between 2007 and 2009.

As noted almost 3/5 (59%) of the respondents reported a previous visit to the area. As can be seen in the following chart, the proportion of previous visits was, as expected, higher for those respondents from Newfoundland and Labrador and for those respondents travelling to the Fogo Island/Change Islands area to visit friends/relatives (includes those visiting for a wedding/family reunion).

![Level of Previous Visits by Segment: 2011 Fogo Island/Change Islands Visitor Survey]

Day Trippers versus Overnighters

As can be seen in the chart presented on the next page, almost 1/3 (32%) of the respondents indicated that their trip to the Fogo Island/Change Islands area was a “same day” trip while the remaining 68% spent at least one night in the area.

Also as can be seen in the chart presented on the next page, the proportion of those respondents staying overnight was higher than average for those respondents from Newfoundland and Labrador and for those respondents travelling to the Fogo Island/Change Islands area to visit friends/relatives (includes those visiting for a wedding/family reunion).
Type of Trip:
2011 Fogo Island/Change Islands Visitor Survey

Day Trip 32.2%
Overnight Trip 67.8%

Trip Type by Segment:
2011 Fogo Island/Change Islands Visitor Survey

Overall
Residents
Non-Residents
Vacation/Pleasure
Visiting Friends/Relatives

Day Trip
Overnight Trip

% of Respondents
Length of Stay

As can be seen in the following chart approximately 3/5 (59%) of the respondents reported they stayed 1 or 2 nights in the Fogo Island/Change Islands area with an additional 22% staying 3 or 4 nights.

The overall length of stay for those respondents reporting at least one night in the Fogo Island/Change Islands area was 3.7 nights.

Respondents travelling to the area to visit friend and relatives (including wedding/family reunion) stay on average 4.9 nights, while those visiting for vacation/pleasure reasons stay on average 2.2 nights.

![Number of Nights Stayed per Party: 2011 Fogo Island/Change Islands Visitor Survey](chart)

Overnight Accommodations

As noted previously, over 2/3 (67.8%) of the respondents visiting the Fogo Island/Change Islands area spent at least one night in the area. The average stay was 3.7 nights.

Travellers to the Fogo Island/Change Islands area can use many types of accommodations during their stay however; as can be seen in the chart presented on the next page, the majority of nights (53%) were spent in the houses of friends and relatives with an additional 10% attributed to nights spent in a seasonal residence/private home.

Other accommodations rates included bed and breakfast/country inn (9% of nights), private cabins/cottages (7%), hotels/motels (6%), commercial campgrounds/trailer parks (6%), roadside/other camping (5%), commercial cabins/cottages (2%) and other accommodations (1%).
Experiences/Impressions of Commercial/Paid Accommodations

As referenced in the above chart, approximately one in four nights (23%) spent in the Fogo Island/Change Islands area was spent in commercial/paid accommodation.

Without exception the majority (45% to 58%) of the respondents indicated a satisfactory rating for each attribute examined however; as can be seen in the chart presented on the next page the attribute of “availability of accommodations” recorded the lowest proportion of respondents indicating excellent (45%) and the highest proportion of respondents indicating this attribute required improvement (12%).

The remaining attributes of overall quality, ease in booking and value for the money all received more than half of the respondents indicating the attribute as excellent (54%, 58% and 51% respectively) while the proportion of respondents indicating improvement ranged form 6% to 8%.

Additionally the top strength as defined by the attribute receiving the highest proportion of respondents reporting “excellent” was ease of booking while the top weaknesses as defined by the attribute receiving the highest proportion of respondents reporting “needs improvement” was availability of accommodations.

Other comments/suggestions offered concerning accommodations included better selection of accommodation, better signage to locate the property, VIC/information
centres for accommodation listings and reservations and ability to make online reservations.

There was need for more modernupdated accommodations with a wide range of improvement and services noted. This included larger rooms, better water quality (drinking), availability of internet, WiFi, better lighting, bigger beds, better mattresses, better pillows, better TV service, bigger TV’s, better radio signal, hair dryers in rooms, coffee makers in rooms, bottled water, laundry services and a hot breakfast.

Survey respondents also indicated more camping sites are needed with services and hook-ups required (water, sewer, electrical, dumping stations), better bathroom and shower facilities and noise control/security required at campgrounds.

Sources of Information for Commercial/Paid Accommodation

As can be seen in the chart presented on the next page, “word of mouth” was the most popular source as 34% of the respondents reported this method while an additional 20% used recommendations from family/friends as an information source.
Other popular sources included other websites (20%), the Provincial Tourism website www.newfoundlandandlabrador.com (16%), the Provincial Travel Guide; “Lost and Found” (14%), brochures specific to the property (7%) and Provincial/Regional Visitor Information Centres (7%).

Only 4% of the respondents utilized the Adventure Central Travel Guide in selecting their commercial/paid accommodations on Fogo Island/Change Islands.

Other sources for information on commercial/paid accommodations in the Fogo Island/Change Islands area included the bulletin board on the ferry (5%), social media (Facebook, Twitter, You Tube) at 2% followed by magazines (2%), auto associations/clubs (1%), newspapers (1%), television (1%) and radio (1%).

![Top Seven Sources of Information for Commercial/Paid Accommodation: 2011 Fogo Island/Change Islands Visitor Survey](image)

**Experiences/Impressions of Ferry Transportation to and from Fogo Island/Change Islands Area**

The ferry transportation is vital to the economy of the Fogo Island/Change Islands area as it is the first and last impression given to travelers/visitors to the area.

Without exception the majority (41% to 58%) of the respondents indicated a satisfactory rating for each attribute examined, however; as can be seen in the table presented on the next page, the strengths of the ferry service as defined by the attributes receiving the highest proportions (top three) of respondents reporting “excellent” included directional signage to the ferry departing Farewell, value for the money and overall quality of the ferry service (43%, 35% and 23% respectively).
The weaknesses of the ferry service as defined by the attributes receiving the highest proportions (bottom three) of respondents reporting “needs improvement” included amenities available onboard the ferry, amenities available in the departure area at Farewell and adherence to the schedule (35%, 26% and 25% respectively).

By far, the ferry service received the most of the additional suggestions and included long waiting times at the terminal areas in Farwell and Man O’ War Cove. Suggestions included a “load and go” system, more frequent trips, better schedules in general and to encourage longer stays, and new/better ferries. Other comments included better signage/directions to the departure area, the posting of ticket prices, allowing reservations, manned canteen, and more tourism information onboard and in the departure area and a cleaner vessel, in particular the washrooms.

<table>
<thead>
<tr>
<th></th>
<th>Signage for Farewell</th>
<th>Amenities at Farewell</th>
<th>Amenities at Man O’ War Cove</th>
<th>Amenities on the Ferry</th>
<th>Adherence to the Schedule</th>
<th>Value for the Money</th>
<th>Quality of Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of Respondents</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Excellent</td>
<td>43.0</td>
<td>17.6</td>
<td>13.8</td>
<td>11.8</td>
<td>22.5</td>
<td>34.8</td>
<td>24.0</td>
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<tr>
<td>Satisfactory</td>
<td>40.6</td>
<td>49.0</td>
<td>44.1</td>
<td>47.5</td>
<td>46.7</td>
<td>53.7</td>
<td>58.4</td>
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<tr>
<td>Needs Improvement</td>
<td>14.6</td>
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<tr>
<td>No Opinion</td>
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<td>7.9</td>
<td>30.3</td>
<td>6.2</td>
<td>6.0</td>
<td>6.9</td>
<td>2.8</td>
</tr>
</tbody>
</table>

**Experiences/Impressions of Road Transportation on Fogo Island/Change Islands**

Without exception the majority (52% to 54%) of the respondents indicated a satisfactory rating for each attribute examined however as can be seen in the chart presented on the next page the strength of road transportation as defined by the attributes receiving the highest proportion of respondents reporting “excellent” was directional signage.

The weaknesses of the road transportation as defined by the attribute receiving the highest proportion of respondents reporting “needs improvement” was the overall quality of the roads.

Other comments/suggestions offered concerning transportation issues included the poor quality of the roads and the need to address the many potholes. The majority of signage suggestions related to the need for more signage to the visitor information centre and to the various sites, trails and attractions on Fogo Island/Change Islands.
Utilization of an Air Component as part of the Trip

As can be seen in the chart presented below almost 1/5 (19%) of the respondents indicated their trip to and/or around the province included an air component.

Also, residents of Newfoundland and Labrador were significantly lower (1%) than average to include a flight as part of their trip while just under ½ (48%) of the non-resident visitors included a flight. There was no real difference in this trip characteristic by the main reason for the visit.
Use of Newfoundland and Labrador Airports

As noted 1 in 5 (18.7%) of the respondents indicated their trip to and/or around the province included an air component. St. John’s International Airport was the most often referenced airport as almost 3/5 (58%) of the respondents used this airport as part of their visit. Other airports utilized included Gander International Airport (24%) and Deer Lake Regional Airport (17%).
Impressions of Newfoundland and Labrador Airports

Without exception the majority (48% to 54%) of the respondents indicated a satisfactory rating for each attribute examined however as can be seen in the chart presented on the next page, the strengths of air transportation as defined by the attributes receiving the highest proportion of respondents reporting “excellent” was amenities available at the airport terminals.

The weaknesses of air transportation as defined by the attributes receiving the highest proportion of respondents reporting “needs improvement” was value for the money.

![Impressions of Airport Services: 2011 Fogo Island/Change Islands Visitor Survey](chart)

Driving a Rented Vehicle

As can be seen in the chart presented on the next page approximately 15% of the respondents indicated they were driving a rented vehicle as part of their trip to the Fogo Island/Change Islands area.

Also, as presented in the chart on the next page, residents of Newfoundland and Labrador were significantly lower (2%) than average to rent a vehicle while 37% of the non-resident visitors rented. Those visitors travelling for vacation/pleasure purposes were somewhat more likely to be driving a rented vehicle than those visiting friends/relatives (including those visiting for a wedding/family reunion).
Driving a Rental Vehicle: 2011 Fogo Island/Change Islands Visitor Survey

- Rental Vehicle: 15.2%
- No Rental Vehicle: 84.8%

Driving a Rental Vehicle by Segment: 2011 Fogo Island/Change Islands Visitor Survey

- Overall: 15.2%
- Residents: 1.9%
- Non-Residents: 37.0%
- Vacation/Pleasure: 18.8%
- Visiting Friends/Relatives: 11.5%

Impressions of Rented Vehicle

As noted approximately 15% of the respondents visiting the Fogo Island/Change Islands area were in a rented vehicle. Approximately 2/3 (66%) of these vehicles were rented at the St. John’s International Airport while 19% were rented at the Deer Lake Regional Airport. Only 10% of the rented vehicles were rented at the Gander International Airport.
As can be seen in the chart presented below, ease in obtaining the rental vehicle and the quality of the vehicle were not seen as an issue as approximately two thirds (67% and 65% respectively) of the respondents reported these two attributes as excellent.

While 45% of the respondents indicated that value for money was satisfactory, one quarter (25%) of the respondents reported this attribute “needs improvement”. This proportion was significantly higher than the “needs improvement” proportions reported with respect to ease in obtaining and the quality of the rental (7% and 4% respectively).

The issues concerning the rental vehicle experience included the high cost, low availability, not enough/limited kilometers, better selection and better quality of vehicles.
The Experiential Side of Fogo Island/Change Islands

As can be seen in the table presented below, the strengths of the “experiential side” of the Fogo Island/Change Islands area as defined by the attributes receiving the highest proportions (top three) of respondents reporting “excellent” included cultural and heritage, activities and adventures and value for the money (51%, 43% and 31% respectively).

The weaknesses of the “experiential side” of the Fogo Island/Change Islands area as defined by the attributes receiving the highest proportions (bottom three) of respondents reporting “needs improvement” included availability of visitor information, availability of amenities and crafts and retail opportunities (22%, 21% and 10% respectively).

<table>
<thead>
<tr>
<th>% of Respondents</th>
<th>Culture and Heritage</th>
<th>Festivals and Events</th>
<th>Crafts and Retail</th>
<th>Visitor Information</th>
<th>Activities and Adventures</th>
<th>Amenities</th>
<th>Value for the Money</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excellent</td>
<td>51.2</td>
<td>25.0</td>
<td>27.7</td>
<td>22.5</td>
<td>43.1</td>
<td>21.6</td>
<td>30.9</td>
</tr>
<tr>
<td>Satisfactory</td>
<td>31.3</td>
<td>23.2</td>
<td>43.9</td>
<td>42.6</td>
<td>39.7</td>
<td>47.6</td>
<td>58.3</td>
</tr>
<tr>
<td>Needs Improvement</td>
<td>4.1</td>
<td>4.7</td>
<td>9.7</td>
<td>21.5</td>
<td>5.1</td>
<td>21.4</td>
<td>4.9</td>
</tr>
<tr>
<td>No Opinion</td>
<td>13.5</td>
<td>47.2</td>
<td>18.7</td>
<td>13.5</td>
<td>12.1</td>
<td>9.4</td>
<td>10.9</td>
</tr>
</tbody>
</table>

Other comments/suggestions offered concerning the visitor experience included a greater availability of information (maps brochures, guides, websites etc) providing a detailed listing of the various activities, sites, trails and attractions on Fogo Island/Change Islands. Better directions/signage to the various attractions, facilities, trails and activities is also required.

There is a need for coffee shops/cafés, more public washrooms, better cell phone coverage/pay phones, ATM services, internet access (WiFi) and more activities. Additional activities suggested included more live entertainment/music, dinner theatres, boat tours, historical tours, picnic areas, ATV trail, kayak rentals, bike rentals, better access to crafts/souvenirs and more activities for children.

The need for improved services as noted above was somewhat tempered by the comment to keep the area original/unspoiled and to leave the island “as is” (i.e. no Tim Horton’s, no McDonalds).

Improved signage to find the trails, need for trail maps, better maintenance (repairs and improvements) required for some trails, easier trails for physically challenged/older visitors and the need for more trails were identified by the survey respondents as ways to improve the product.
Food Services on Fogo Island/Change Islands

As can be seen in the table presented below, the strengths of food services as defined by the attributes receiving the highest proportions (top three) of respondents reporting “excellent” included quality and taste of the food, the quality of service and serving size (58%, 55% and 54% respectively).

The weaknesses of food services as defined by the attributes receiving the highest proportions (bottom four) of respondents reporting “needs improvement” included availability of food service establishments, variety of food items/menu selection, value for the money and atmosphere (27%, 11%, 5% and 5% respectively).

<table>
<thead>
<tr>
<th>% of Respondents</th>
<th>Quality and Taste</th>
<th>Presentation of Food</th>
<th>Serving Size</th>
<th>Quality of Service</th>
<th>Variety and Selection</th>
<th>Atmosphere</th>
<th>Availability of Establishments</th>
<th>Value for Money</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excellent</td>
<td>58.1</td>
<td>49.8</td>
<td>53.7</td>
<td>54.5</td>
<td>40.3</td>
<td>45.0</td>
<td>25.9</td>
<td>36.2</td>
</tr>
<tr>
<td>Satisfactory</td>
<td>36.9</td>
<td>45.0</td>
<td>40.4</td>
<td>41.2</td>
<td>47.3</td>
<td>47.1</td>
<td>44.9</td>
<td>53.2</td>
</tr>
<tr>
<td>Needs Improvement</td>
<td>3.9</td>
<td>3.6</td>
<td>2.5</td>
<td>2.0</td>
<td>10.6</td>
<td>5.4</td>
<td>27.0</td>
<td>5.4</td>
</tr>
<tr>
<td>No Opinion</td>
<td>1.1</td>
<td>1.6</td>
<td>3.4</td>
<td>2.3</td>
<td>1.8</td>
<td>2.5</td>
<td>2.3</td>
<td>5.2</td>
</tr>
</tbody>
</table>

The issues concerning food service included the availability (more needed) of restaurants both in terms of family (lower cost) restaurants but also the need for cafés, coffee shops and sandwich shops. The availability of food service was also needed in the ferry departures areas at Farewell and Man O’ War Cove.

Other suggestions included less fried food, greater menu selection/more variety, more reasonable priced (and availability of) seafood, healthier choices (fruits and vegetables), the availability of an “early morning” breakfast, dining with ocean views, children’s menu, improved service and the requirement for a restaurant guide (places to dine/eat).
Satisfaction with the Visit to the Fogo Island/Changes Islands

As can be seen in the following charts, travellers and visitors to the Fogo Island/Change Islands area are very satisfied with their visit as almost 3/5 (58%) of the respondents indicated very satisfied with an additional 26% reporting mostly satisfied.

Those respondents reporting they were very satisfied with their visit to the Fogo Island/Change Islands area rated the attributes related to experiences, accommodations, food service, transportation and heritage and culture higher than average.

 Overnight visitors to the area reported higher satisfaction levels than day trippers. This visitor attribute was similar for both first time and repeat visitors.
Willingness to Recommend the Fogo Island/Change Islands to Others

As can be seen in the following charts, travellers and visitors to the Fogo Island/Change Islands area approximately 3/4 (75%) of the respondents indicated they were very likely to recommend the area to others. An additional 22% were likely to recommend a visit.

Those respondents reporting they were very likely to recommend Fogo Island/Change Islands to others rated the attributes related to experiences, accommodations, food service, transportation, heritage and culture higher than average.

Overnight visitors to the area are more likely to recommend the area than day trippers. This visitor attribute was similar for both first time and repeat visitors.
Willingness to Return to the Fogo Island/Changes Islands Area

As can be seen in the following charts, travellers and visitors to the Fogo Island/Change Islands area approximately 2/3 (67%) of the respondents indicated they were very likely to return for a future visit while an additional 22% were likely to return.

Those respondents reporting they were very likely to return to Fogo Island/Change Islands for a future visit rated the attributes related to experiences, accommodations, food service, and heritage and culture higher than average.

Overnight visitors to the area are more likely to return to the area than day trippers. The proportion of repeat visitors very likely to return was about twice the proportion of first time visitors.
The Previous Night and the Next Night

Not surprisingly and as can be seen in the following table almost \( \frac{3}{4} \) (75%) of the respondents reported they spent their night previous to the trip to the Fogo Island/Change Islands area in the Central Region with 15% of the respondents spending their previous night in a community on the Avalon Peninsula.

Similarly 71% of the respondents planned to spend their next night after leaving the Fogo Island/Change Island area in the Central Region with 16% of the respondents spending their next night on the Avalon Peninsula.

<table>
<thead>
<tr>
<th>% of Respondents</th>
<th>Previous Night</th>
<th>Next Night</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avalon Peninsula</td>
<td>14.8</td>
<td>15.5</td>
</tr>
<tr>
<td>Eastern Region</td>
<td>2.1</td>
<td>3.0</td>
</tr>
<tr>
<td>Central Region</td>
<td>74.9</td>
<td>71.2</td>
</tr>
<tr>
<td>Western Region</td>
<td>6.5</td>
<td>9.3</td>
</tr>
<tr>
<td>Labrador</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Outside the Province</td>
<td>1.6</td>
<td>1.1</td>
</tr>
</tbody>
</table>

Demographics

Household Composition

As can be seen in the chart presented on the next page, 1/3 (33%) of the respondents reported their household consisted of a couple with children living at home with an additional 28% indicating couple with children no longer at home.

One quarter (26%) of the respondents travelling to the Fogo Island/Change Islands area was couples with no children.

As can be seen in the table presented on the next page, residents of Newfoundland and Labrador are more likely than average to report their household composition as couple with children living at home while non-resident travel parties are more likely than average to indicate their household composition as couples with no children.

Also as can be seen in a following tables, respondents travelling to the Fogo Island/Change Islands area for vacation/pleasure reasons were more likely than average to report their household composition as couples with no children or couples with the children no longer living at home, while those visiting friend and relatives were more likely than average to be households with children still living at home.
<table>
<thead>
<tr>
<th>Household Composition: 2011 Fogo Island/Change Islands Visitor Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of Respondents</td>
</tr>
<tr>
<td>Residents of Newfoundland &amp; Labrador</td>
</tr>
<tr>
<td>--------------------------------------</td>
</tr>
<tr>
<td>Couple with No Children</td>
</tr>
<tr>
<td>Couple with Children Living at Home</td>
</tr>
<tr>
<td>Couple with Children Left Home</td>
</tr>
<tr>
<td>Single with No Children</td>
</tr>
<tr>
<td>Single with Children Living at Home</td>
</tr>
<tr>
<td>Single with Children Left Home</td>
</tr>
<tr>
<td>Other</td>
</tr>
<tr>
<td>% of Respondents</td>
</tr>
<tr>
<td>--------------------------------------</td>
</tr>
<tr>
<td>Couple with No Children</td>
</tr>
<tr>
<td>Couple with Children Living at Home</td>
</tr>
<tr>
<td>Couple with Children Left Home</td>
</tr>
<tr>
<td>Single with No Children</td>
</tr>
<tr>
<td>Single with Children Living at Home</td>
</tr>
<tr>
<td>Single with Children Left Home</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>

* includes those respondents visiting Fogo Island/Change Islands for a wedding/family Reunion

**Number of People in Travel Group by Age**

As can be seen in the following chart presented on the next page, almost 1/5 (20%) of the people visiting the Fogo Island/Change Islands area were between 55 and 64 years of age while 17% were between 45 and 54 years of age. An additional 16% were between 65 and 74 years of age.

Approximately 13% of the people were children 12 or younger with an additional 8% between 13 and 17 years of age.

As can be seen in the table presented on the next page, residents of Newfoundland and Labrador are more likely than average to report their travel party was comprised of people 35 to 54 years of age as well as report a higher than average proportion of parties having children 12 of years of age and younger.

Non-resident travel parties are more likely than average to indicate their travel party was comprised of people 55 and older and less likely than average to have children in their party under the age of thirteen.

Also as can be seen in a following table, respondents travelling to the Fogo Island/Change Islands area for vacation/pleasure reasons were more likely than average to report their party consisted of people over the age 56 and older while those visiting friend and relatives were more likely than average to report their party included children.
% of People by Age Category:
2011 Fogo Island/Change Islands Visitor Survey

% of Respondents

<table>
<thead>
<tr>
<th>Age Category</th>
<th>Residents of Newfoundland &amp; Labrador</th>
<th>Non-Residents</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>12 or Younger</td>
<td>14.4</td>
<td>9.8</td>
<td>12.6</td>
</tr>
<tr>
<td>13-17</td>
<td>8.8</td>
<td>6.1</td>
<td>7.7</td>
</tr>
<tr>
<td>18-24</td>
<td>2.9</td>
<td>1.3</td>
<td>2.3</td>
</tr>
<tr>
<td>25-29</td>
<td>2.6</td>
<td>3.0</td>
<td>2.7</td>
</tr>
<tr>
<td>30-34</td>
<td>4.0</td>
<td>4.3</td>
<td>4.2</td>
</tr>
<tr>
<td>35-39</td>
<td>7.0</td>
<td>4.7</td>
<td>6.1</td>
</tr>
<tr>
<td>40-44</td>
<td>8.6</td>
<td>6.6</td>
<td>7.8</td>
</tr>
<tr>
<td>45-54</td>
<td>18.5</td>
<td>13.6</td>
<td>16.9</td>
</tr>
<tr>
<td>55-64</td>
<td>16.4</td>
<td>25.6</td>
<td>19.9</td>
</tr>
<tr>
<td>65-74</td>
<td>14.3</td>
<td>18.6</td>
<td>16.2</td>
</tr>
<tr>
<td>75 or Older</td>
<td>2.3</td>
<td>6.3</td>
<td>3.7</td>
</tr>
<tr>
<td>% of Respondents</td>
<td>Vacation/Pleasure</td>
<td>Visiting Friends/Relatives*</td>
<td>Overall</td>
</tr>
<tr>
<td>------------------</td>
<td>------------------</td>
<td>-----------------------------</td>
<td>---------</td>
</tr>
<tr>
<td>12 or Younger</td>
<td>11.1</td>
<td>18.5</td>
<td>12.6</td>
</tr>
<tr>
<td>13-17</td>
<td>3.5</td>
<td>8.4</td>
<td>7.7</td>
</tr>
<tr>
<td>18-24</td>
<td>1.6</td>
<td>3.0</td>
<td>2.3</td>
</tr>
<tr>
<td>25-29</td>
<td>1.9</td>
<td>4.1</td>
<td>2.7</td>
</tr>
<tr>
<td>30-34</td>
<td>3.6</td>
<td>5.1</td>
<td>4.2</td>
</tr>
<tr>
<td>35-39</td>
<td>4.9</td>
<td>7.9</td>
<td>6.1</td>
</tr>
<tr>
<td>40-44</td>
<td>8.1</td>
<td>7.6</td>
<td>7.8</td>
</tr>
<tr>
<td>45-54</td>
<td>16.3</td>
<td>17.0</td>
<td>16.9</td>
</tr>
<tr>
<td>55-64</td>
<td>23.2</td>
<td>14.5</td>
<td>19.9</td>
</tr>
<tr>
<td>65-74</td>
<td>20.7</td>
<td>11.7</td>
<td>16.2</td>
</tr>
<tr>
<td>75 or Older</td>
<td>5.1</td>
<td>2.3</td>
<td>3.7</td>
</tr>
</tbody>
</table>

*includes those respondents visiting Fogo Island/Change Islands for a wedding/family Reunion

**Education Level (Highest Level)**

As can be seen in the following chart, ½ (50%) of the respondents travelling/visiting the Fogo Island/Change Islands area reported they have some or graduated College or University or other post secondary training. An additional 19% indicated their highest level of education as some or graduated community college, technical college or vocational training.
As can be seen in the following tables, non-residents travelling/visiting the Fogo Island/Change Islands area are more likely than average to have completed post graduate studies.

As well visitors travelling for vacation/pleasure purposes are also more likely than average to have completed post graduate studies.

<table>
<thead>
<tr>
<th>% of Respondents</th>
<th>Residents of Newfoundland &amp; Labrador</th>
<th>Non-Residents</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>High School or Less</td>
<td>15.0</td>
<td>11.4</td>
<td>13.6</td>
</tr>
<tr>
<td>Some or Graduated Community, Technical or Vocational Training</td>
<td>21.1</td>
<td>13.1</td>
<td>18.5</td>
</tr>
<tr>
<td>Some or Graduated College, University or other Post Secondary</td>
<td>53.4</td>
<td>45.8</td>
<td>50.1</td>
</tr>
<tr>
<td>Post Graduate (Masters, Doctorate)</td>
<td>10.5</td>
<td>29.7</td>
<td>17.8</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>% of Respondents</th>
<th>Vacation/Pleasure</th>
<th>Visiting Friends/Relatives*</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>High School or Less</td>
<td>12.2</td>
<td>20.2</td>
<td>13.6</td>
</tr>
<tr>
<td>Some or Graduated Community, Technical or Vocational Training</td>
<td>17.1</td>
<td>17.8</td>
<td>18.5</td>
</tr>
<tr>
<td>Some or Graduated College, University or other Post Secondary</td>
<td>46.0</td>
<td>54.2</td>
<td>50.1</td>
</tr>
<tr>
<td>Post Graduate (Masters, Doctorate)</td>
<td>24.7</td>
<td>7.8</td>
<td>17.8</td>
</tr>
</tbody>
</table>

*includes those respondents visiting Fogo Island/Change Islands for a wedding/family Reunion
Household Income

As can be seen in the following chart over ¼ (28%) of the respondents travelling/visiting the Fogo Island/Change Islands area reported they have a household income between $100,000 to $149,999; while an additional 11% indicated their household income was $150,000 or more.

![Household Income Chart]

As can be seen in the following table non-residents travelling/visiting the Fogo Island/Change Islands area are more likely than average to have a household income in excess of $100,000

<table>
<thead>
<tr>
<th>% of Respondents</th>
<th>Residents of Newfoundland &amp; Labrador</th>
<th>Non-Residents</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $40,000</td>
<td>14.1</td>
<td>9.7</td>
<td>12.6</td>
</tr>
<tr>
<td>$40,000 to $69,999</td>
<td>27.3</td>
<td>22.7</td>
<td>25.6</td>
</tr>
<tr>
<td>$70,000 to $99,999</td>
<td>24.6</td>
<td>22.1</td>
<td>23.4</td>
</tr>
<tr>
<td>$100,000 to $149,999</td>
<td>26.6</td>
<td>29.3</td>
<td>27.8</td>
</tr>
<tr>
<td>$150,000 or More</td>
<td>7.4</td>
<td>16.2</td>
<td>10.6</td>
</tr>
</tbody>
</table>

As well visitors travelling for vacation/pleasure purposes are also more likely than average to have a household income in excess of $100,000 (see table presented on the next page).
<table>
<thead>
<tr>
<th>% of Respondents</th>
<th>Vacation/Pleasure</th>
<th>Visiting Friends/Relatives*</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $40,000</td>
<td>10.8</td>
<td>21.1</td>
<td>12.6</td>
</tr>
<tr>
<td>$40,000 to $69,999</td>
<td>24.2</td>
<td>20.2</td>
<td>25.6</td>
</tr>
<tr>
<td>$70,000 to $99,999</td>
<td>23.8</td>
<td>22.0</td>
<td>23.4</td>
</tr>
<tr>
<td>$100,000 to $149,999</td>
<td>29.5</td>
<td>25.7</td>
<td>27.8</td>
</tr>
<tr>
<td>$150,000 or More</td>
<td>11.7</td>
<td>11.0</td>
<td>10.6</td>
</tr>
</tbody>
</table>

* includes those respondents visiting Fogo Island/Change Islands for a wedding/family Reunion

Joe Batt’s Arm, Fogo Island (photograph taken May 9, 2011 by Steve Bartlett of the Telegram)
Appendix

Copy of the 2011 Fogo Island/Change Islands Visitor Survey
FOGO ISLAND / CHANGE ISLANDS
VISITOR SURVEY

Dear Traveller:

The Kittiwake Economic Development Corporation, in partnership with the Department of Tourism, Culture & Recreation and the Shorefast Foundation, is conducting a survey to better understand your needs and enhance the tourist experience on Fogo Island and Change Islands.

We would appreciate your assistance in answering the following questions about your visit to the area. 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.

1. Where do you live?

(City/Town) ____________________________ (Province/State) ____________________________ (Country)

2. Including yourself, how many people are travelling with you as one travel party on this trip? (A travel party is a group of people traveling together and sharing activities, visits and expenditures associated with this trip.)
   a. ___________ People
   b. Which of the following best describes your travel party? (Please select the appropriate category)
      a. Alone
      b. Couple with no children
      c. Couple with children
      d. Two or more couples, no children
      e. Two or more couples, with children
      f. Other family members
      g. Group of friends
      h. Business associates
      i. Other (please specify) ___________

3. What is the MAIN reason for this trip to the Fogo Island/Change Islands area? The main reason is the reason without which this trip would not have taken place? (Please select only one)
   a. Vacation or Pleasure
   b. Visiting Friends or Relatives
   c. Seasonal residence (summer home)
   d. Wedding/Family Reunion
4. In planning this visit to the Fogo Island/Change Islands area, what sources of information did you use? (Please circle ALL that apply)

a. Official Provincial Tourism Web Site: www.newfoundlandlabrador.com
b. Other Websites
c. Official Provincial Travel Guide; “Lost and Found
d. Adventure Central Travel Guide
e. Social Media (Facebook, Twitter, You Tube)
f. Visitor Information Centre
g. Newspapers
h. Magazines
i. Television
j. Radio
k. Auto Associations/Clubs
l. Recommendation from Family/Friends
m. Word of Mouth
n. Other ______________

5. Have you visited the Fogo/Change Islands area before?

a. Yes (please specify the date) _______________(MM/YY)
b. No

6. How would you describe this stay in the Fogo Island/Change Islands area?

a. A day trip (arrive and depart same day) Please specify the date of your visit

_________________ Please skip to question #8

b. An over night trip (Please specify your arrival and departure date and the number of Nights spent in the Fogo/Change Islands area.

Arrival Date _____________ Departure Date ___________
Total Nights ________

7. OVER NIGHT ACCOMMODATIONS

a. During this trip, how many nights did your travel party spend in each of the following types of accommodations?

Please enter the number of nights in the spaces provided
Hotels/Motels _________ Nights
Commercial Cabins/Cottages _________ Nights
Bed and Breakfasts (B & B’s)/Country Inn _________ Nights
Houses of Friends and Relatives _________ Nights
Private Cabins/Cottages _________ Nights
Commercial Campgrounds/Trailer Parks _________ Nights
“Roadside Camping” _________ Nights
Other ___________________ _________ Nights

Please rate the following as it relates to your experience with the commercial/paid accommodations in the Fogo Island/Change Island area

Please mark only one response for each of the listed items

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Satisfactory</th>
<th>Needs Improvement</th>
<th>No Opinion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Quality</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Availability of Accommodations</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Ease of Booking Accommodations</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Value for Money</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
</tbody>
</table>

How did you find out about your commercial/paid accommodations? (Please circle ALL that apply.)

a. Official Provincial Tourism Web Site: www.newfoundlandlabrador.com
b. Other Websites
c. Official Provincial Travel Guide; “Lost and Found
d. Adventure Central Travel Guide
e. Brochure specific to the property
f. Bulletin board on the Ferry
g. Social Media (Facebook, Twitter, You Tube)
h. Visitor Information Centre
i. Newspapers
j. Magazines
k. Television
l. Radio
m. Auto Associations/Clubs
n. Recommendation from Family/Friends
o. Word of Mouth
p. Other ___________________

In terms of accommodations, what suggestions do you have that would improve your experience?

________________________________________________________________
8. TRANSPORTATION

Please rate the following transportation elements as they relate to your visit to the Fogo Island/Change Islands area

Please mark only one response for each of the listed items

<table>
<thead>
<tr>
<th>Ferry Transportation to and from Fogo/Change Islands area</th>
<th>Excellent</th>
<th>Satisfactory</th>
<th>Needs Improvement</th>
<th>No Opinion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Directional signage to the ferry departing Farewell</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Amenities onshore/departure area at Farewell</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Amenities onshore/departure area at Man O’War Cove</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Amenities available onboard ferry</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Adherence to the Schedule</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Value for Money</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Overall Quality of Ferry Service</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
</tbody>
</table>

| Road Transportation (on Fogo Island and Change Islands)                              |           |              |                   |            |
| Quality of Roads                                                                    | O         | O            | O                 | O          |
| Directional Signage (distance, direction)                                           | O         | O            | O                 | O          |
| Promotional Signage (attractions, activities etc)                                   | O         | O            | O                 | O          |

Air Transportation

Did any component of your trip to and/or around the province include air travel?
   a. Yes
   b. No Please skip to question #9

Which airport(s) in the province of Newfoundland and Labrador were used as part of this trip? __________________________
Please mark only one response for each of the listed items

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Satisfactory</th>
<th>Needs Improvement</th>
<th>No Opinion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Availability of Flights</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Flight Schedule</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Amenities at the Airport Terminal</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Value for money</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
</tbody>
</table>

In terms of transportation (ferry, road and air services) what suggestions do you have that would improve your experience?

_______________________________________________________________________

9. Are you driving a rented vehicle?
   a. No. please skip to question #10
   b. Yes
      Please indicate where (eg. Community/airport) you rented the vehicle___________

Please rate the following elements as they relate to the rental vehicle?

Please mark only one response for each of the listed items

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Satisfactory</th>
<th>Needs Improvement</th>
<th>No Opinion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ease in obtaining a rental vehicle</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Quality of the rental vehicle</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Value for money</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
</tbody>
</table>

Comments ________________________________________________
10. **EXPERIENCES**

Please rate the following elements as they relate to your visit to the Fogo/Change Island area

Please mark only one response for each of the listed items

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Satisfactory</th>
<th>Needs Improvement</th>
<th>No Opinion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Culture and Heritage</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>(museums, historic sites, Interpretation Centres)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Festivals and Events</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>(Theatre, folk, music)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Crafts and Retail</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>(craft shops, tea rooms)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Availability of Visitor Information</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Activities/Adventures</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>(sightseeing, trails, tours, picnics)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amenities (washrooms, cell phone, internet, ATM, Banking)</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Value for money</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
</tbody>
</table>

With respect to things to see and do, what suggestions do you have to improve your experience on Fogo/Change Islands?

__________________________________________________________________
11. FOOD SERVICES

Please rate the following elements as they relate to your visit to the Fogo/Change Island area

Please mark only one response for each of the listed items

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Satisfactory</th>
<th>Needs Improvement</th>
<th>No Opinion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality/taste of the food</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Presentation of the food</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Serving size</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Quality of service from the food server</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Variety of food items/Menu selection</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Atmosphere of dining establishment</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Availability of food service establishments</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Value for money</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
</tbody>
</table>

In terms of food services, what suggestions do you have that would improve your experience?

_________________________________________________________________

12. Overall, how satisfied were you with your visit to the Fogo/Change Island area?

   a. Very Satisfied
   b. Mostly Satisfied
   c. Satisfied
   d. Mostly Unsatisfied
   e. Very Unsatisfied
   f. No Opinion

13. How likely would you be to recommend a visit to the Fogo/Change Island area to others?

   a. Very Likely
   b. Likely
   c. Unlikely
   d. Very Unlikely
   e. Unsure
14. How likely would you be to return to the Fogo/Change Island area for another visit?
   a. Very Likely
   b. Likely
   c. Unlikely
   d. Very Unlikely
   e. Unsure

15. What was the most enjoyable aspect of your visit?

16. What was the least enjoyable aspect of your visit?

17. Prior to your visit to the Fogo Island/Change Islands area, in what community did you spend your last overnight? __________________________

18. After departing the Fogo/Change Islands area, in what community do you expect to spend your next overnight? _____________________________

Please be assured that your responses to this series of questions are confidential and will only be used to group the survey results so that we can make the best use of the information gathered.

a. Which of the following best describes your household composition?
   1. Couple with no children
   2. Couple with children living at home
   3. Couple with children that have ALL left home
   4. Single with no children
   5. Single with children living at home
   6. Single with children that have ALL left home
   7. Other ______________

b. Including yourself, how many people in your travel party are: Please enter the number(s).
   1. 12 and under _____ 5. 30-34 _____ 9. 55-64 _____
   2. 13-17 _________ 6. 35-39 _____ 10. 65-74 _____
   3. 18-24 _________ 7. 40-44 _____ 11. 75 and over _____
   4. 25-29 _________ 8. 45-54 _____

In which of these age groups do you belong? __________________________
c. What is the highest level of education that you have completed?

1. High school or less
2. Community/technical College/vocational training (some or graduated)
3. College, university/other post secondary (some or graduated)
4. Post graduate (e.g. Masters Degree, doctorate)

d. Which of the following categories best corresponds to your household income before taxes and deductions? Please state in Canadian dollars.

1. Less than $40,000
2. $40,000 to $69,999
3. $70,000 to $99,999
4. $100,000 to $149,999
5. $150,000 or more

19. Please provide any additional comments you may have concerning your visit:

__________________________________________________________________
__________________________________________________________________
__________________________________________________________________

Thank you for your time today!
Enjoy the rest of your visit!!

Kittiwake Economic Development Corporation,
P.O. Box 2222, Gander NL A1V 2N9
Toll free: 877-256-2595
www.kittiwake.nf.ca Email: edkedc@nfld.net or edokedc@nfld.net