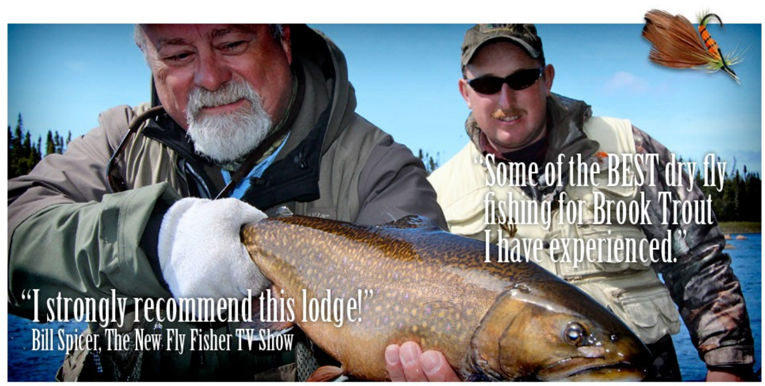
Labrador Tourism Destination Visitor Appeal Appraisal

Dare to Be Different!



Conducted by:

Submitted by: Tourism Café Canada & Brain Trust Marketing & Communications (January 2015)

Map of Labrador Visitor Region

Executive Summary

In 2009, the tourism industry and province of Newfoundland and Labrador (NL) released their vision to double tourism revenues to $1.58B by 2020. Titled *Uncommon Potential: A Vision for Newfoundland and Labrador Tourism (Vision 2020)* this document has been a blueprint growth in NL guided by seven strategic directions. Underpinning the vision is respect for home, residents, travellers, communities and profitability. Labrador is an emerging destination that has been described as the 'last tourism frontier' to be developed in North America.

VISION STATEMENT

Newfoundland and Labrador be a leading tourism destination, offering an authentic and exotic experience, through the 'creativity brand pillars of people, culture and the natural environment'.

Uncommon Potential

Situated near the iconic Gros Morne National Park and the Viking Trail, which have had decades of investment and collaborative development, comparatively Labrador is in its infancy. As such, for tourism to be key economic driver of growth, building regional pride, and creating employment, it requires significant infrastructure investments such as roads and communications, but also requires building the human resource capacity and the depth, diversity and quality of authentic experiences that attract high-yield residents and non-resident travelers to experience "*The Big Land*."

Strategic directions #4 was product development aimed at ensuring NL delivers memorable, travel experiences to attract visitors from around the world. This is the key to delivering on the provincial brand promise and bringing the brand to life based on the assets and attributes of a diverse array of natural and cultural heritage combined with the colorful character of the people.

To guide the regional strategic investments in product and destination development, Hospitality Newfoundland and Labrador (HNL) in partnership with the Department of Tourism, Culture and Recreation (TCR), commissioned a customized Tourism Destination Visitor Appeal Appraisal (TDVAA) to be completed in each region. Led by Tourism Café Canada and Brain Trust Marketing and Communications, the project team included HNL, TCR and Destination Labrador (DL). The over-arching goals were to create an understanding of what needs to be done to strengthen the ability to grow the tourism industry in ways that:

1) Resonate with travelers, reinforce the brand and increases the return on investment;
2) Continue to improve the visitor experience and visitor economy; and
3) Empower the Labrador Region to be a visible leader of responsible, sustainable tourism.

Designed to take a visitor-centric approach, this study reviewed 193 documents, reports and studies combined, plus data from the Tourism Destination Management System (TDMS) and Restaurant Association of NL's (RANL) e-dining databases. New variables were added to the primary data collection that was supported by DL and TCR. This 9-month process (October 2013 to June 2014) incorporated insights from an online stakeholder questionnaire and community stakeholder sessions in November 2013 to launch the project, and March 2015 to present and secure input on the preliminary findings. Finally, a parallel Nunatsiavut Tourism Refresh project, which leveraged the TDVAA, added additional insight from 26 interviews, a second advisory committee, plus community visits and in-person and online stakeholder meetings with a range of professionals from tourism operators, government employees, elected officials, heritage guides, Parks Canada staff and members of the artisan community.

Specifically, the TDVAA examined five dimensions using qualitative and quantitative data:

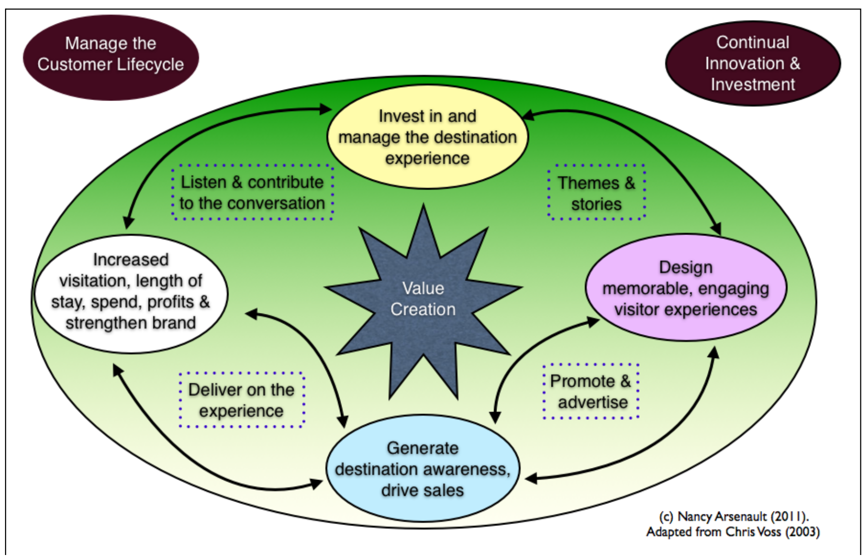
1. **Reports**, plans and research documents, and projects-in-the-pipeline.
2. **Visitor profile information** and three customer engagement tools for tourism services and attractions and municipalities: Websites, Facebook and TripAdvisor.
3. **Product and market** dimensions which included primary and secondary demand generators, transportation and access, visitor information centers, accommodations, culture, heritage and nature based assets, trails and routes, recreational and man-made attractions, shopping and retail, culinary, food and beverage, conference, conventions and trade shows, activity-based tourism businesses (e.g. whale watching) and program based tourism businesses (e.g. festivals and events, guiding companies).
4. **Sustainability** dimensions which included human resources, sales and marketing practices, environmental and social practices, strategic planning and investment.
5. **Measures of success** against which progress is measured and new variables are considered that would enrich understanding and decision-making.

Benefits of the Assessment

"A successful visitor economy requires managing all of the components in an integrated and long-term way, with a clear focus on the needs of the visitors the destination is seeking to attract"[1]

The core benefit from the TDVAA is that it provides a consolidated review and key findings to guide the strategic direction for optimizing the tourism investment cycle (Figure 1) and the tactical investments for destination development.

Figure 1: The Tourism Experience Investment Cycle



In Labrador this is critical for tourism based projects, but also the many regional developmental initiatives that benefit people, communities and visitors alike such as the paving of the Trans-Labrador Hwy, replacing the aging ferries, improving telecommunications, and the Muskrat Falls resource development. All of these provincial initiatives will have an impact on tourism to greater or lesser degrees and have been considered in this Labrador TDVAA.

[1] Culture Northwest (2006). *Understanding the visitor economy.* Downloaded from: http://culturehive.co.uk/wp-content/uploads/2013/04/Understanding-the-Visitor-Economy.pdf

Key Findings

Seventeen aggregate key findings emerged from the analysis of the primary and secondary data sources (Chapter 4), and the iterative feedback process that ensured continual stakeholder input and validation throughout the nine months. Each key finding, detailed in Chapter 3, is supported by tactical actions that provide the foundation for operators, HNL, TCR, IBRD, Parks Canada, the Nunatsiavut Government (NG), Tourism Nunatsiavut (TN), and the Atlantic Canada Opportunities Agency (ACOA) to support implementation.

Finding #1: Labrador is a jewel in the provincial tourism crown that has the potential to experience unprecedented growth and expansion over the next decade.

Finding #2: Long-term success in driving new market share in Labrador requires a collective vision for product development, a commitment to competing on value, developing and consistently delivering high quality, market ready memorable visitor experiences, and shared investment and risk between government and the private sector.

Finding #3: The support of local communities is essential for tourism to flourish in Labrador.

Finding #4: The Nunatsiavut Government's commitment to investing in tourism, in ways that strengthens the capacity of individuals, businesses and host communities, is starting to generate measurable results.

Finding #5: User-friendly customer profiles will help operators better understand Labrador's ideal guests.

Finding #6: Labrador's visitor experience has the potential to truly bring the "Uncommon Potential" brand of the Newfoundland and Labrador's tourism experience to life.

Finding #7: Nunatsiavut is taking a leadership role in developing capacity for an Artisan Network and an Experiential Providers Network to generate opportunity and raise the international profile of Labrador's Inuit.

Finding #8: Outfitters are a major asset to Labrador's tourism industry; but their potential is not yet being fully realized.

Finding #9: There's an untapped opportunity to respond to niche market demand and further develop winter sports tourism in Labrador.

Finding #10: The province has the potential to lead the way in Labrador with innovative visitor servicing in a northern Canadian context.

Finding #11: The online presence for Labrador tourism businesses requires improvement; but keep it simple.

Finding #12: There is an opportunity to improve the food and beverage options in Labrador, but the owners/operators face a number of challenges.

Finding #13: Efforts to protect the natural environment and cultural tourism assets exist in large part because of the due diligence of Parks Canada, the Nunatsiavut Government and the non-government organizations in Labrador.

Finding #14: "Tourism in Labrador is not just about sustainability, it's about survivability." Dare to be different with innovative projects and contract-based approaches to investing in tourism development.

Finding #15: There is a rich resource of reports, plans and research studies available but Labrador would benefit from some additional targeted research.

Finding #16: TDMS and E-dining databases have limitations, which if addressed, will benefit visitors, operators and the province in achieving the goals of *Vision 2020*.

Finding #17: Amend five *Vision 2020* goals to optimize the investment focus needed to achieve the desired outcomes.

Implementation

Implementation involves three main phases and will look different depending on the specific recommendation and as various organizations become the champions for action. The first step is for tourism stakeholders to review the “Head Start Items’ summarized in Chapter 5 that represent immediate short-term opportunities which can be advanced in the next 6 to 9 months. This includes making presentations at community councils to engage them in learning about the plan and how they can support the short and long-term development of tourism in Labrador.

The second step is to put the recommendations through IBRDs Operations Management process (OM) so that DL, NG, TN, TCR, HNL, IBRD, and ACOA can prioritize the projects together and within their individual organizations for budgeting and planning.

The third step involves forming stakeholder project task teams with individuals representing organizations that will benefit from opportunity. Leadership will be provided by HNL and TCR, with direct participation from the DL Board and TDVAA Advisory Committee. An annual review by HNL, TCR, DL and NG/TN will allow for year-to-year monitoring of the progress and adjusting to evolving realities as time passes and new learning during implementation occurs.

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1. An Investment in the Future

In 2009, the tourism industry and province of Newfoundland and Labrador (NL) released their vision to double tourism revenues to $1.58B by 2020. Titled *Uncommon Potential: A Vision for Newfoundland and Labrador Tourism (Vision 2020)* this document has been a blueprint growth in NL guided by seven strategic directions. Underpinning the vision is respect for home, residents, travellers, communities and profitability. Labrador is an emerging destination that has been described as the 'last tourism frontier' to be developed in North America.

VISION STATEMENT

Newfoundland and Labrador be a leading tourism destination, offering an authentic and exotic experience, through the 'creativity brand pillars of people, culture and the natural environment'.

Uncommon Potential

The vision for the future requires the collective will of many stakeholders who contribute to achieving the desired outcomes.[2]

Situated near the iconic Gros Morne National Park (GMNP) and the Viking Trail that have had decades of investment and collaborative development, comparatively Labrador is in its tourism infancy. As such, for tourism to be key economic driver of growth, building regional pride, and creating employment, it requires significant infrastructure investments such as roads and communications, but also the development of authentic and unique experiences to attract residents and non-resident travelers to experience "*The Big Land*.

The Newfoundland and Labrador (NL) brand stands for 'creativity' that is natural, spontaneous, and uncomplicated. It's an emotional brand that stands on the three pillars of the real character of the people, a rich history, heritage and culture, and the natural environment that enjoys 29,000 km of coastline and icons.[3] Labrador's story is remarkable and different than Newfoundland's. Through strategic investments in tourism and capacity building, the unique heritage of the north, south, west and central sub-regions of Labrador can be shared with the world.

Contributing to Vision 2020

One of the key strategic directions in Vision 2020 is product development, objective #4, delivering strategic and sustainable travel experiences. The visitor experience is a combination of the pre-visit engagement, a mix of places they visit, activities and services they enjoy, and the people with whom they connect. This creates the memories that they share through photos, online messages, or private reflection. It is the sum of the visitors' emotional and physical connection to Labrador that must be addressed in developing products and experiences that will generate new revenue for businesses and memorable value for guests

Labrador is comprised of many small communities with transportation and access limitations. The visitor's journey and mode of transportation is impacted by travellers ability to access the south coastal drive, travel east-west along the Trans-Labrador Highway (TLH), connect via cruise ships to visit coastal communities, and reaching northern communities via plane, the Northern Ranger, or snowmobile for the adventurous in the winter.

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[2] Newfoundland and Labrador (2009). *Uncommon Potential: A Vision for Newfoundland and Labrador Tourism.*
[3] NL Brand Positioning Statement. www.tcr.gov.nl.ca/tcr/tourism/tourism_marketing/newfoundland_and_labrador_brand.

Developing tourism requires a long-term term vision as some of the key factors currently shaping the future of Labrador are led by other departments within the government and the private sector, including: paving of the TLH, replacing the ferries, improving telecommunications into communities, and the new Muskrat Falls development. ***It is for this reason TDVAA for Labrador has taken a 10-year outlook, even though Vision 2020 has 5.5 years remaining for achieving its goals.*** This was intentional to ensure that the opportunities and needs for developing tourism can be factored into major infrastructure and economic development activities within, and between, communities.

Finally, Labrador has a unique opportunity to leverage tourism development with the Nunatsiavut Government (NG) that was formed in 2005. They opted to leverage the provincial investment in the TDVAA to refresh their strategy to ensure alignment with Destination Labrador (DL), Hospitality Newfoundland and Labrador (HNL), and the Department of Tourism, Culture and Recreation (TCR), as they share the goals to develop tourism that:

1) Resonates with travellers and reinforces the brand and increase the return on investment;
2) Continues to improve the visitor experience and visitor economy; and
3) Visibly leads in its responsibility for sustainable tourism.

The NG plan however is community based, whereas the TDVAA is regionally based. The foundation for development in NG is based on a social entrepreneurial approach of developing people; businesses, communities and tourism, appreciating tourism can only thrive if the communities thrive. Their refreshed strategy was completed 29 June 2014.

Purpose of the Project

The Tourism Destination Visitor Appeal Assessment (TDVAA) responds to the Newfoundland and Labrador Tourism Board's (NL Tourism Board) interest in advancing Strategic Direction #4 of *Vision 2020*[4], which is focused on product and experience development.

HNL, TCR, DL, NG, Tourism Nunatsiavut (TN), the Department of Innovation, Business and Rural Development (IBRD), and Atlantic Canada Opportunities Agency (ACOA), have engaged in a formative review process to assess Labrador's appeal, identify gaps and opportunities and ensure alignment for investment and development of the destination with all Tourism Board partners over the near and long term.

Brain Trust Marketing and Communications and the Tourism Cafe Canada were contracted to develop a customized assessment approach that engages the destination marketing organizations in data collection and a process for engaging stakeholders at multiple touch-points through the 9-month process (October 2014 to June 2014).

Acknowledgements

Labrador is the second destination to complete the TDVAA process. Special thanks are given to project team members from DL, TCR and HNL, plus the Advisory Committees for the TDVAA and the NG Tourism Refresh for their various roles in supporting data collection, analysis, hosting stakeholder meetings, reporting, ensuring 'local area' insight and stakeholder validation.

Project oversight was the responsibility of the DL Advisory Committee. These individuals provided an on-the-ground perspective at the local level to the project team that had representation from the NL Tourism Board, HNL, TCR, DL, TN, Brain Trust and the Tourism Cafe.

Structure of the Report

Chapter 2 describes the TDVAA assessment framework and the conceptual framework that underpins the formative research methodology.

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4 Government of Newfoundland Labrador. (2009, February). Uncommon Potential: A Vision for Newfoundland and Labrador Tourism. Retrieved from http://www.tcr.gov.nl.ca/tcr/publications/2009/Vision_2020.pdf

Chapter 3 presents the 17 key findings beginning with a statement of fact, based on the analysis of qualitative and quantitative information followed by a brief summary description of the finding, then a list of opportunities and recommendations. Items identified with a represent ‘Head-Start Tactics’ that can begin immediately while the remaining elements are prioritized through the IBRD Operations Management (OM) process.

Chapter 4 provides detailed information that was gathered, and consolidated, as one of the major sources of information of the report. It begins with a Tourism Barometer to position Labrador within the provincial, national and international context for tourism. The lengthy Data Insights section begins with a high level summary of the key dimensions. This is followed by a discussion of each dimension. First a summary of the data gathered is presented. This is followed by key findings, a series of bullets that extracts highlights from the data, and includes any qualitative inputs from stakeholder consultation that strengthens the ability to understand what is happening on the ground. Finally, the implications and considerations conclude each section providing the researchers interpretation of the information based on analysis, team discussions and multiple validation sessions with stakeholders.

Chapter 5 describes implementation, includes a brief synopsis of the IBRD OM process and provides a summary table of the Head-Start tactics.

Five appendices conclude the report: (1) Contributing stakeholders, (2) Glossary of Terms, (3) Bibliography, (4) Nunatsiavut stakeholders, and (5) Vision 2020 alignment summary.

2. The Destination Assessment Framework

2.1 What is a Tourism Destination Visitor Appeal Assessment?

The Tourism Destination Visitor Appeal Assessment (TDVAA) is designed to provide a foundation of knowledge about Newfoundland and Labrador's *"appeal"* at a regional level. Understanding the appeal of a region's assets and attributes is vital to identifying priorities for investing in product development that best delivers on the provincial brand promise.

"A successful visitor economy requires managing all of the components in an integrated and long-term way, with a clear focus on the needs of the visitors the destination is seeking to attract"[5]

The TDVAA is based on formative assessment based on a wide range of primary and secondary data sources and numerous qualitative inputs from community presentations, online stakeholder meetings and invitations to review preliminary findings. The key findings, recommendations and opportunities that emerge (Chapter 3) informs the key stakeholders in Labrador's tourism industry where investment is needed to create and improve the visitor experience, enhance the competitiveness of the destination and strengthen the capacity of tourism businesses.

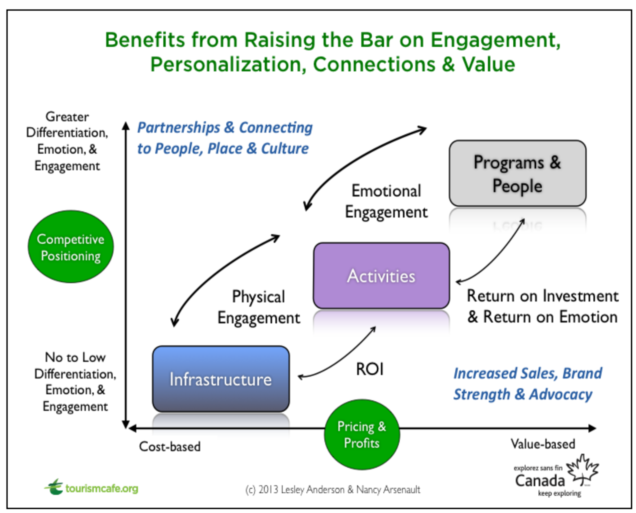
2.2 The Conceptual Framework Underpinning the Study

The ability to increase the benefits from the Visitor Economy for travellers and businesses alike can be enhanced by understanding how to raise the bar generating value that strengthens the ability to differentiate tourism products, create an emotional connection with travellers and engage them with the special people, places, cultures and traditions in a destination (Figure 2).

Travellers will typically engage with a variety of different companies when travelling depending on the purpose of their visit, length of stay and whom they are travelling with. The opportunity to enhance the visitor's journey by creating itineraries, based on different traveller types and typical travel paths represents an important opportunity for Labrador.

The travel routes available for the visitor to access Labrador, and the limited options available by plane, sea, or road were an important consideration. A focus on experience clusters along natural travel corridors was assessed.

Figure 2: Raising the Bar on Value to the Visitor



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[5] Culture Northwest (2006). *Understanding the visitor economy.* Downloaded from: http://culturehive.co.uk/wp-content/uploads/2013/04/Understanding-the-Visitor-Economy.pdf

In tourism, the businesses and organizations that support the visitor experience can be clustered into three categories; each having a very different operating realities, but all important to travellers ability to holistically enjoy and engage in the special people, places and cultures that a destination has to offer.

> Sophisticated travellers expect vacation experiences that tell the true story of the destination. Experiences that let you emotionally connect to a place and at the same time, self-discovery.
>
> ***Uncommon Potential***

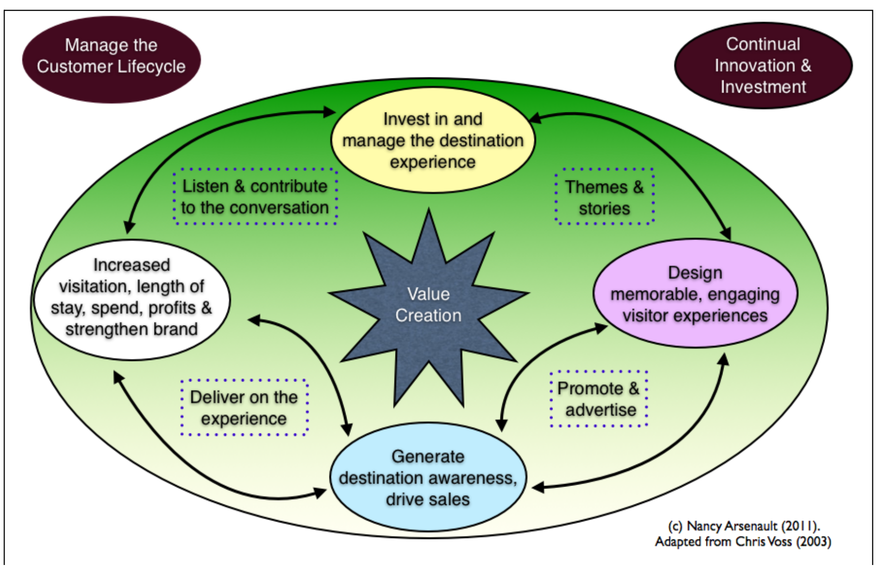
- ***Infrastructure based businesses/operations*** have high fixed costs, require volume and/or base funding to build, maintain or preserve the facilities, hence they focus on the mass market with targeted niche markets to drive business. Examples include hotels, historic sites, parks, attractions, theatres, restaurants, transportation, sports facilities and large tour operators who own their transportation. Most operate year round, which requires carefully managing revenue and yield for high and slow seasons.
- ***Activity-based businesses/operations*** have fixed costs related to a particular type of activity, but compared to infrastructure based businesses the capital investment is much lower. They require steady volume and often cater to niche markets and smaller groups as often some skills or equipment associated with the activity is required. Examples include whale watching or kayaking companies, tour operators, and outfitters.
- ***Program and people based businesses/operations*** have very low or no infrastructure costs; rather they rent or pay user fees to gain access to places to stage their visitor interactions. They typically appeal to very niche markets, have a low-volume, high-yield ratio, and know their customers extremely well to be sustainable with low volume. Examples: Guiding companies, storytellers, artisans, and musicians. The one exception is festivals that appeal to larger markets at a lower price point, but they are fully dependent on the quality of people and programs that are foundational to the 'reason to visit' and therefore are in this category.

Benefits of Investing in this Assessment

The core benefit of investing in a TDVAA is to gain a consolidated understanding of the destinations' potential to strengthen the visitor economy by ensuring the assets and attributes of a region are aligned in ways that optimize the tourism experience investment cycle (Figure 1).

The visitor economy has a broader focus than that of the 'tourist' as it encompasses all value created by attracting visitors to a destination; all the things that make the place special, distinctive, engender pride and create memories. At the heart of value creation is value for the visitor, tourism businesses and the host communities.

Figure 1: The Tourism Experience Investment Cycle



Specifically, the benefits from this study include:

1) An understanding of the destinations current state and status within the larger tourism marketplace and the opportunities and challenges associated with that state;
    - An informed foundation for preparing a long-term regional destination product development plan that will also inform the marketing strategy;
    - An ability to prioritize investments in infrastructure, activity and program development to enhance the visitor experience that in turn will lead to new revenues, increased visitation and the ability to deliver on the brand promise;
    - A synthesized database of critical tourism business data within the destination; and
    - An engaged industry in the discussions, outcomes and implementation requirements for the study.

2.3 Methodology

The TDVAA uses a formative evaluation research methodology. Informed by both qualitative and quantitative data sources, preliminary findings emerge that are shared with stakeholder to gather their insights and feedback at multiple touch-points to ensure the research team 'has heard correctly, interpreted the data accurately' and to allow the nuances, important to stakeholders, to be added into the process that ultimately leads to an aggregate set of 'key findings' followed by recommendations for action.

For the Labrador TDVAA the touch-points included:

1) Establishing a Labrador Advisory Committee;
    - Hosting community and online presentations to inform stakeholders of the project;
    - Engaging data collectors from the province and destination who provided the quantitative input as well as the reports, documents and studies that could impact the project;
    - Inviting stakeholders to contribute via an industry survey;
    - Participating in on-going meetings with the Advisory Committee, project team, complete with TCR and HNL team members keeping their organizations and boards appraised of the progress;
    - Consolidating and analyzing the data and reviewing preliminary findings first with the client, then via presentations with the advisory committee, government stakeholders, and in-community presentations with industry;
    - Formulating the key findings, opportunities and recommendations, again securing detailed feedback and reflections from HNL, DL and TCR before presenting them to the Advisory Committee and Government Representations via an online presentation;
    - Preparing a draft report for DL, TCR and HNL's review and input; and
    - Finalizing the report.

Separate documents that detail the research process, the research framework, and the data collection template are available from HNL, TCR and DL, along with an annotated bibliography of all references.

Data Sources

Multiple data sources informed this report: (1) 193 Reports, plans and documents – see Appendix 3, (2) Data from the TDMS and E-dining databases supplemented by additional variables, (3) an online industry survey, (4) Six face-to-face stakeholder meetings, 3 in November 2013, 2 in March 2014, (5) Multiple online meetings and presentations with the TDVAA Advisory Committee, NG Tourism Strategy Refresh Committee, the project team, and special sessions with TCR, IBRD and ACOA.

The data was organized into five dimensions that together, provide a holistic assessment. Presented in Table 1, they are: (1) reports, plans and studies, (2) the visitor profile and targeted online engagement, (3) product and market variables, (4) sustainability, and (5) measures of success.

A glossary of terms for the project is included in Appendix 2.

Table 1: Key Dimensions

1. Reports, Plans and Studies Dimensions. Existing information available to industry, plus projects in the pipeline at the discussion stage or submitted for approval/funding.		
Consolidate Existing Information	Existing information Projects in the pipeline	Identifies the documents, plans, studies, and projects that impact.
2. Visitor Dimensions. A tourism destination with a high appraisal can demonstrate their investment in understanding the traveller.		
The Visitor Profile	Demographic research Psychographic research Satisfaction & exist surveys	Identifies the research available to inform decision-making based on an understanding of the traveller.
Customer Engagement	Website and social media links Trip Advisor Facebook	Assesses if the destination, cities and businesses have a TripAdvisor & Facebook account and the degree of responsiveness to traveller posts.
3. Product and Market Dimensions. Determines the depth and breadth of tourism products, services and experiences available at various price points for different markets.		
Assets & Attributes	Baseline Infrastructure Activity-Based Tourism Businesses Program-Based Tourism Businesses Demand Generators/Visitation Motivators	Identifies the core tourism assets and demand generators that contribute to a positive visitor experience and motivate travellers to visit.
4. ***Sustainability: Growing Tourism into the Future Dimensions.*** Key elements of a responsible, sustainable tourism destination.		
Resource Base	Human Resources Sales & Marketing Environmental & Social Practices Strategic Planning & Investment	Essential resource investments to sustain a viable tourism business and destination into the future.
5. **Measures of Success Dimension.**		
Key Performance Indicators	Measures of Success	Specific, measurable indicators of success against which to benchmark.

A total of 193 reports, plans and studies were reviewed at the international, national, provincial, regional and community level to inform all five dimensions. Additionally, client meetings and community-based stakeholder meetings provided facts and context to the foundation of knowledge used to produce the key findings and recommendations. Appendix 3 provides a bibliography of all secondary sources considered. Primary research was conducted to secure the information needed for Dimensions 2, 3, and 4.

2.4 Project Scope and Limitations

The TDVAA was focused at the Labrador Region level. This was not a comparative analysis of the sub-regions or individual businesses. Recommendations, actions and opportunities focus at the regional level. Implementation of the recommendations will vary depending on the tourism operator or agency leading (e.g. DL, HNL, TCR, IBRD, NG, TN, and ACOA).

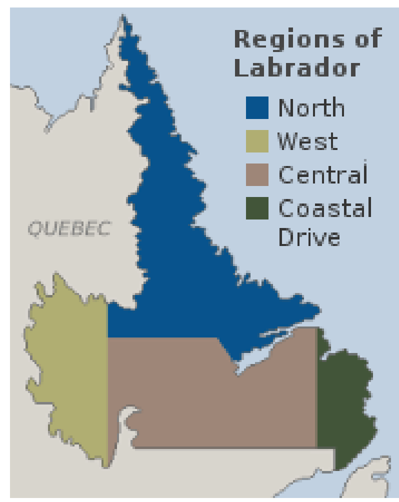
The key limitations to the study include the:

- Ability of the primary data collectors to gather information from tourism businesses during seasonal fluctuations (high or low season);
- Degree to which the advisory committees, industry and government stakeholders participated in the community stakeholder meetings, online survey, preliminary finding feedback sessions and review of the final recommendations to provide feedback, local area and governmental interpretation and validate the findings;
- Level of detail that could be examined with reports and documents given the unanticipated volume of 193 documents relative to the time and budget for the project;
- Interpretation of what constitutes a ‘project in the pipeline’ relative to it being a community asset vs. an asset that drives visitation;
- Amount and type of data available regionally vs. provincially;
- Changes to Statistics Canada’s Travel Survey of Residents of Canada in 2011 resulted in an inability to compare data for the Resident’s survey to previous years.
- Variables available from the provincial Tourism Destination Management System (TDMS) and the E-Dining Data Base of RANL; and
- Budget and human resources available.

3. Key Findings & Recommendations

A niche market destination, Labrador is comprised of many small communities, with significant distances between them. The travel experience, be it by road, plane, boat or snowmobile in the winter, must be developed in ways that is an integral part of the visitor journey. Given the number of people who visit Labrador will always be less than Newfoundland, ***a focus on developing tourism that attracts the high-yield, long-haul visitor is essential.***

Core to this approach is the need to consistently deliver high quality experiences that meets the needs and expectations of resident and non-resident travellers, while retaining the rustic charm that is part of Labrador's appeal. Building the visitor experiences must encourage movement throughout the region and tap into the unique charm and stories of the individual communities and four regions.



The long-term potential for ***Labrador to become an iconic, sub-arctic, once-in-a-lifetime travel destination can be realized*** through careful, progressive investments in building the capacity in all four regions for product development, market development and human resource/business development required to grow and sustain a tourism viable industry.

Given the small population of most communities, the cost of living in the north and the upward pressures on costs due to the growth in the resource sector, investment in tourism growth must be targeted.

Due to limited human resource capacity in the region, priority should be given to supporting existing businesses and projects that build collaboration between companies and enhance the visitor's journey through Labrador.

Success in Labrador, which includes the independently governed Nunatsiavut northern territory, requires that the different visitor experiences between Newfoundland and Labrador be strongly marketed.

Travellers choosing Labrador will want to explore the region, connect with the locals, and discover the hidden gems within, and between communities. New tourism investment needs to consider the visitor's journey and their mode of transportation. Investment needs to be directed where the greatest requirements are for visitor services, accommodation, meals, basic amenities and memorable visitor experiences. This will have direct effect on enhancing appeal and competitiveness. Mass tourism solutions will not work.

As an emerging destination, Labrador requires the support of government to share the investment risk and strengthen the human, financial and technical resources needed to generate the greatest benefits for travellers, businesses, communities, and the province.

The need for economic development to go hand-in-hand with tourism development is vital so when major projects, like the Trans-Labrador Highway (TLH) are approved, or the RFP for new ferries is crafted, tourism is invited to contribute the 'hospitality and visitor' lens during project conception, and to ensure new visitor experiences are market ready upon project completion.

Summary of the Key Findings

Seventeen aggregate key findings emerged from the Labrador TDVAA based on a synthesis of a variety of information sources including documents, reports, studies, stakeholder meetings and presentations (in-community and online), an on-line survey, and on-going input from the TDVAA Advisory Committee, the supplemental NG Tourism Refresh Advisory Committee, DL, HNL, TCR, NG and TN. The detailed data and interpretation that formed the foundation for the analysis are presented in Chapter 4.

A finding is written as a statement of fact designed to capture the essence of a key discovery. Based on the analysis of qualitative and quantitative information, each key finding statement is followed by a brief summary description of the finding, then a list of opportunities and recommendations. Items identified with a represent 'Head-Start Tactics' that can begin immediately while the remaining elements are prioritized through the IBRD Operations Management (OM) process. They are also summarized in Chapter 5.

Finding #1: Labrador is a jewel in the provincial tourism crown that has the potential to experience unprecedented growth and expansion over the next decade.

Finding #2: Long-term success in driving new market share in Labrador requires a collective vision for product development, a commitment to competing on value, developing and consistently delivering high quality, market ready memorable visitor experiences, and shared investment and risk between government and the private sector.

Finding #3: The support of local communities is essential for tourism to flourish in Labrador.

Finding #4: The Nunatsiavut Government's commitment to investing in tourism, in ways that strengthens the capacity of individuals, businesses and host communities, is starting to generate measurable results.

Finding #5: User-friendly customer profiles will help operators better understand Labrador's ideal guests.

Finding #6: Labrador's visitor experience has the potential to truly bring the "Uncommon Potential" brand of the Newfoundland and Labrador's tourism experience to life.

Finding #7: Nunatsiavut is taking a leadership role in developing capacity for an Artisan Network and an Experiential Providers Network to generate opportunity and raise the international profile of Labrador's Inuit.

Finding #8: Outfitters are a major asset to Labrador's tourism industry; but their potential is not yet being fully realized.

Finding #9: There's an untapped opportunity to respond to niche market demand and further develop winter sports tourism in Labrador.

Finding #10: The province has the potential to lead the way in Labrador with innovative visitor servicing in a northern Canadian context.

Finding #11: The online presence for Labrador tourism businesses requires improvement; but keep it simple.

Finding #12: There is an opportunity to improve the food and beverage options in Labrador, but the owners/operators face a number of challenges.

Finding #13: Efforts to protect the natural environment and cultural tourism assets exist in large part because of the due diligence of Parks Canada, the Nunatsiavut Government and the non-government organizations in Labrador.

Finding #14: "Tourism in Labrador is not about sustainability, it's about survivability." Dare to be different with innovative projects and contract-based approaches to investing in tourism development.

Finding #15: There is a rich resource of reports, plans and research studies available but Labrador would benefit from some additional targeted research.

Finding #16: TDMS and E-dining databases have limitations, which if addressed, will benefit visitors, operators and the province in achieving the goals of *Vision 2020*.

Finding #17: Amend five *Vision 2020* goals to optimize the investment focus needed to achieve the desired outcomes.

FINDING #1: LABRADOR IS A JEWEL IN THE PROVINCIAL TOURISM CROWN THAT HAS THE POTENTIAL TO EXPERIENCE UNPRECEDENTED GROWTH OVER THE NEXT DECADE.

Labrador is one of North America's last unspoiled frontiers, where tourism development, like its history and traditions, is evolving at a pace of its own.

People have lived on the land for millennia and over the last 30 years, a tourism industry has emerged that has slowly been increasing the visitor appeal potential in all four sub-regions of Labrador. An abundance of amazing beauty, wildlife and world-class fishing lodges makes Labrador a landscape full of wonder and special people. It is also the only place in the province that offers a sub-arctic experience, exotic coastlines and the Northern Lights. The diverse cultural and heritage of this northern most part of the province boasts a rich diversity of the aboriginal, Inuit, Innu and European settlers, and the stories, traditions and warmth of the people are sure to delight visitors for centuries to come.

As well, there is emerging interest in major cruise ship lines to venture to the '*Big Land',* attracted in part by Red Bay's UNESCO designation. Labrador has a tourism industry eager to see growth in visitation.

Decades of investment by tourism operators, the provincial and federal governments, the NG and DL have carved out a place in NL's tourism landscape, capturing 7% of resident travellers.[6] Several major projects in the pipeline that will be completed over the next decade will enhance the tourism landscape increasing access and providing a stage for expanding diversified tourism experiences (Table 2).

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6 Government of Newfoundland & Labrador. (2012, Jan.). *Resident travel survey summary report - Final - 2010.* A study by MarketQuest Omnifacts Research for the Department of Tourism, Culture and Recreation. Pg. 23.

Table 2: Projects in the Pipeline Offering the Greatest Tourism Potential

South Coast	• Red Bay National Historic Site visitor experience development relative to their new UNESCO World Heritage status
Labrador	• Paving of Trans Labrador Highway (TLH) from Labrador City to Red Bay • South & North Coast Apollo and Northern Ranger Ferry replacement RFP • Mealy Mountains Application for National Park Designation • Development potential for Wonderstrands Beach and adventure hiking
North Coast	• Nain Torngâsok Cultural Centre, $16M investment • Hopedale Moravian Mission Complex, $2.5M investment • Hebron continued restoration and improved interpretation and reconstruction of Hudson Bay Houses as visitor accommodations • Rigolet Archaeology project with the construction of a Sod House near the 5 km extension of the Rigolet boardwalk. • Nain - Old Town Development • Makkovik 5.35 km Walking Trail, $480K

Together, these elements will enable the northern jewel in Newfoundland's crown to sparkle brighter.

Yet for all its emerging potential, there are stressors on this emerging regional destination that must be carefully managed. The significant growth in the mining and resource sectors and the new Muskrat Falls development is anticipated to add pressures for accommodation, ferry space, skilled labour and air access. The ability of the resource sector to pay higher prices could drive prices up, while driving the availability of accommodations down, putting inverse pressure on the tourism industry and its operators, who want to maintain some inventory for the long term development of the tourism industry. The opening of the TLH will offer increased traffic flow through the region, and as the only major east-west highway, this important transportation link must meet the needs of the Labradorean people, business development opportunities and tourists – all who add economic value to the region at different scales.

Finally, Labrador is a region comprised of small communities of 300 to 1000 people with the exception of Labrador City and Happy Valley-Goose Bay. The people have lived, and continue to live off the land and pride themselves on their ability to sustain themselves, their families and their communities. Historic survival has meant an inward focus on family and community and people from away were not common. As tourism expands, visitors from around the world will increasingly be drawn to iconic places in Labrador and it is the responsibility of all tourism proponents to ensure people and communities are not taken advantage of, their hospitality abused, and their growing knowledge of the tourism industry not a detriment to their success.

Labrador must be managed holistically, with tourism as a major player at all developmental discussions – it is one element, and a revenue generating industry that can add important considerations to the social and economic development of the region.

The Trans-Labrador Highway (TLH) will have a significant impact on people and communities in west, central and southern Labrador. Far more than a tourism initiative, the benefits of this highway being paved will service locals, the resource industries, and travellers alike.

The physical road that connects Labrador City to L'Anse au Clair will require essential services like Wi-Fi, washrooms, and garbage collection at rest stops. Until these services are available, the visitor experience will be limited. This means that visitors will need to be well advised of the nature of the road so they come prepared for what is there, and what isn't. This is a role for government.

Opportunity/Recommendations

1. **TCR, ACOA, IBRD, HNL:** Work with other government departments to secure the funding to ensure that investments that have started in basic services along the TLH include the needs of the visitor journey: Visitor friendly rest-stops with enough space for trucks, RVs, coaches and cars to stop, clean washrooms, visitor information, Wi-Fi, safety information, garbage cans, and signage along the route that lets travellers know how many kilometers to the services and the next community. This may require a special budget, but the benefits will service local citizens, the resource industry travellers and visitors alike.
2. **DL, IBRD, & ACOA:** Investigate the tourism development of other mega energy sites like the Hoover Dam in Nevada and the W.C. Bennett Dam in northern British Columbia to learn how they developed an active and engaging way to tell a part of their history and development that has immense appeal to people from away. For example, the Bureau of Reclamation began conducting tours of the Hoover Dam in 1937; 1M visitors per year visit the site and drive across the damn. On a smaller scale, the WC Bennett Dam in northern British Columbia carries a 4-star rating on trip advisor and the province is investing in a new visitors centre to support the steady visitor interest for guests travelling the Alaska Hwy. Large companies always have a contribution to community and educational mandate to give back, and this is one way that not only achieves such a goal, but also produces revenue, albeit small compared to the extraction of natural resources.
3. **DL & TCR:** DL to optimize TripAdvisor and Facebook to communicate where the emerging amenities can be accessed on and along the TLH, complete with driving times to communities accessible from the highway and where guests can access gas, accommodations, groceries, health services, etc. QR codes may also provide an option. As the facilities and amenities are in place, TCR could update existing traveller information documents to reflect the changes.
4. **DL & Operators:** Consider developing customized travel packages for the people who work in mining and energy sectors, encouraging them to explore Labrador, bring their families and friends and experience the very landscapes they are earning a living from. DL to work with a targeted set of operators, with market ready product to approach incentive houses like Canadian Tours International, Maritz Travel Company or leading companies in the insurance, or financial services sectors, to purchase incentive travel opportunities at remote lodges and flight-seeing tours to present high-end visitor experiences, aligned with the once-in-a-lifetime visits to northern fishing resorts of Labrador.

These recommendations support Goals 1.3, 2.1, 2.2, 3.1 4.1, 4.2, 6.1, 6.2 and 6.3 of *Vision 2020*.

FINDING 2: LONG-TERM SUCCESS IN DRIVING NEW MARKET SHARE IN LABRADOR REQUIRES A COLLECTIVE VISION FOR PRODUCT DEVELOPMENT, A COMMITMENT TO COMPETING ON VALUE, DEVELOPING AND CONSISTENTLY DELIVERING HIGH QUALITY, MARKET-READY, MEMORABLE VISITOR EXPERIENCES, AND SHARED INVESTMENT AND RISK BETWEEN GOVERNMENT AND THE PRIVATE SECTOR.

The emerging demand for authentic, engaging, personalized visitor experiences that connect visitors to the special people and places they visit continues to grow. Labrador is ideally poised to develop and deliver world-class tourism products that respond to this demand; in fact, some operators are already benefiting from doing this. But, destination stakeholders (private, public and not-for-profit) must agree on a collective approach to destination development based on understanding the traveller.

Labrador's cultural history has four distinct stories found in each of its sub-regions. These stories can be developed within the regions and become the connective tissue for the experience corridor development opportunities that deliver on the provincial brand promise and engage visitors in a truly unique and differentiated northern Canadian experience (Table 3). Given the geographical separation between sub-regions and the limited travel access options within each region, building a suite of visitor experiences that brings to life the character of each sub-region, avoids duplication and ensures something different for visitors, will be critical to long term success.

Table 3: Building the Labrador Story Based on the Region's Historical Evolution

	North	South	West	Central
Potential Story/Theme	Adventures and mysteries of the Labrador Inuit[7]	A treasured past in Labrador's southern coastal communities	Earth's natural riches: Labrador's resource industries	Trapping: Our way of life, past and present
Focus	The Inuit culture, traditions, way of life	The influence of the Europeans and fishing on Labrador's coastal communities, connecting to the island	The impact of 'water', mining and energy resource development	Celebrates the rich tradition of Labradoreans living off the land, past and present
Visitor Access	Fly, Northern Ranger (new RFP), cruise ship into communities	Drive up Viking Trail, crossing at St. Barbe NL to Blanc Sablon, QC or via the TLH	Fly in or drive from Quebec	Fly into Happy-Valley Goose Bay or drive 530 KM from Labrador City
Core Infrastructure & Place Based Assets	Torngat Mountains NP, Moravian Mission, Hebron and future Torngâsok Cultural Centre	Red Bay NHS & UNESCO WHS, Battle Harbour National Historic District, Point Amour Lighthouse	Iron Ore Mine, Bowdoin Canyon, Churchill Falls (Underground Hydro Facility)	Labrador Interpretation Centre, Heritage Museum
Depth of potential	Emerging, strong potential	Most developed, greatest potential relative to visitor numbers	Longer-term	Longer-term

The product development strategy must be rooted in competing on value and striving to attract the high-yield traveller to optimize the return on investment for the volume of visitors who will travel to Labrador but equally important, the return on emotion for visitors who choose the destination for their travel experience.

The old adage *"The further away, the more willing to pay"* applies to Labrador. For non-resident travellers seeking that once-in-a-lifetime visit and a connection to the untouched, less travelled, rustic, northern paradise where the traditions and cultures of the past remain alive, yet are interspersed with the evolutions of modern time, they can find it in Labrador. Exits surveys indicate a traveller type with the demographic profile that can afford to invest in a memorable travel experience are the ideal prospects for a Labrador experience.

Selling on value has a direct and implicit reality of delivering above and beyond the expectation of the visitor, regardless of price point. Currently, the capacity between attractions, communities, businesses and transportation providers varies widely. But, focusing and committing to a long-term development objective with targeted investments in growth should generate an overall increase in capacity and drive new market share. And some seeds have already been planted.

Currently, the visitor experience at the Torngats Base Camp and Research Station (operated by NG Solutions), which employs 100% Inuit staff, has received the Canadian Tourism Commissions (CTC) Canadian Signature Experience status and is being marketed internationally by the CTC for its unique visitor experience. Add to this world-class fishing and hunting outfitters, Red Bay National Historic Site – a UNESCO World Heritage Site - Battle Harbour Historic District and the Torngat Mountains National Park, it is evident Labrador has an amazing number of national and international demand generators.

CANADIAN SIGNATURE
EXPERIENCES
CANADIENNES DISTINCTIVES

7 This is the official tagline for Nunatsiavut tourism and it will be confirmed in the 2014 Tourism Refresh that this will remain as the foundation for their tourism development.

However, while there are internationally recognized experiences in Labrador, this study also revealed substantial variances in the quality, consistency and market readiness of the product, as well as operators' understanding of the visitor. Limited human resources in small communities means that capacity must be slowly and strategically built, yet they must also deliver incremental results en route to succeed.

Through a strategic approach to product and people development, the opportunity to layer on differentiated, quality experiences to the significant physical asset base will be key in the future for connecting travellers with the people of Labrador. The infrastructure alone will not drive the desired results. Steady gains in visitation and capacity building, partnerships, combined shared investment, and risk will be foundational to developing and marketing Labrador successfully in the decade to come.

Opportunity/Recommendations

1. **DL, NG, Parks Canada & Operators:** Plan for the staged development of four experience corridors (Table 4) that optimize the transportation realities and weave the stories of Labrador into a meaningful journey. This includes a range of activities such as defining the ideal guests, asset mapping of the infrastructure, activities people/programs, identifying gaps and priorities for product development, training, and community appreciation of the tourism potential in each community along the routes.

Table 4: Four Visitor Journey Routes

Experience Corridor	The Story	Visitor Route	Immediate focus
Priority #1. **Labrador Coastal Drive (LCD)** (Drive & cruise)	The influence of the Europeans and fishing off Labrador's coastal communities, connecting to the Viking Trial	Deer Lake to Red Bay and Battle Harbour	Enhanced activities, programs and experiences with targeted infrastructure improvements
Priority #2. The Inuit Journey (Fly or cruise)	Adventures and mysteries of the Labrador Inuit	Goose Bay through NG's five communities	Infrastructure development, while building community capacity for activities/programs
Priority #3. Cruise Journey	Relationship between the Labrador's aboriginal people and the sea	North-south cruise	Diversified shore excursions, avoiding community duplication
Priority #4 **Part 1. Trans Labrador Hwy:** *East/West (Drive)* **Part 2. Trans Labrador Hwy:** *North/South (Drive or cruise)*	Gifts from the land: The mining, energy and trappers stories connected to people's survival on the land	Labrador City to Happy Valley-Goose Bay	Infrastructure development en route, enhancements to the physical journey followed by connecting to activities and programs with the LCD
		Happy Valley-Goose Bay to Cartwright and Battle Harbour	Concept stage, driven in part by the timing of the Mealy Mountains NP designation

2. **TCR, DMO, NT, Parks Canada & Local Area Businesses:** Establish a Northern Coastal Visitor Experience Taskforce, comprised of businesses and government agencies that see benefits in developing the visitor potential of these four visitor journey routes to plan the phased development for enhancing the visitor experience.

3. **DL with Operators:** Examine individual contributions to the experience categories and how individual businesses could contribute. This includes everything from leading tour development and expanding existing packages from 4 to 7 to 10 days, to creating new partnerships for experience development or new supplier relationships.

4. **Parks Canada, DL & the Western DMO:** Focus on Priority #1. Strike South Coast Experience Taskforce of businesses who want to introduce new tourism experiences to market. Map the interpretive experience from Deer Lake through for all types of engagement from the use of QR interpretive hot spots, non-personal interpretation, interactive programs or intimate authentic encounters with locals will benefit development. The data inventory from this study and the current Western DMO TDVAA enroute will expedite this process. Currently Red Bay is conducting a Visitor Experience Master Plan targeted for completion in August 2014 that will also contribute to this task. The degree to which this plan connects the journey, vs. focusing exclusively on the town of Red Bay will in part guide the work to be done with tourism stakeholders along the route.

5. **TN, NG & Parks Canada:** The second priority is for the North Coast. Embedded in the 2014 – 2020 Nunatsiavut Tourism Strategy Refresh are two product development projects, one focused on developing the Artisan Network, the second an Experience Provider Network.

6. **TCR & Parks Canada**: Support the product development process by providing visitor profile information, available at the provincial and national levels, that can best inform and be used to create customer profiles for the ideal guests for each corridor.

7. **Cruise Operators:** Efforts should be made to clearly define the types of experiences guests are looking for so this may be factored into the development plans for new products and experiences.

8. **HNL, TCR, GMIST, and BICT & PARKS Canada:** Facilitate an approach to product development that helps operators learn to raise the bar on engagement, personalization, connections and value aligned with different types of travellers. Workshops have proven not to be enough; business coaching on implementation will assist in helping business apply their learning efficiently.

9. **TCR & DL:** Set baseline measures for capturing the metrics associated with the experience categories (e.g. number of communities involved, number of businesses impacted, number and type of options available to visitors, range of price points from free to high value, etc.).

10. **TCR, ACOA, IBRD, Parks Canada, & NG:** Create a dedicated experience development fund for each of the experience corridors to ensure the investment in developing the people, programs, and visitor activities can occur, in sustainable ways, to compliment the millions of dollars in infrastructure that is in play. This will ensure benefits to businesses increase, the quality and depth of the visitor experience is enhanced and standards for quality can be realized.

These recommendations support Goals 1.2, 1.3, 3.2, 4.1, 6.1, 6.3 and 7.1 of *Vision 2020*.

FINDING #3: THE SUPPORT OF LOCAL COMMUNITIES IS ESSENTIAL FOR TOURISM TO FLOURISH IN LABRADOR.

Community sustainability is enhanced through supporting the needs of its citizens to ensure a healthy balance of social, economic and environmental development. In an emerging tourism destination, such as Labrador, tourism development must ensure benefits for the traveller, businesses and the community.

The capacity for tourism to flourish may be a challenge for small, northern, rural businesses and communities. There are limitations, however, this is part of the appeal and charm for visitors who choose to travel to connect with northern cultures, places and people.

A steady, strategic path built on a strong community foundation of economic development and tourism, support from municipal councils, an understanding of the 'new tourism' approaches, and visitor expectations are all vital to developing the potential and avoiding duplication. Supporting priority investments that benefit the visitor, businesses and community should be advanced first. Done well, responsible tourism growth can bring direct and indirect benefits to the communities and people of Labrador. Continued success requires a coordinated approach between all layers of government, this is essential in optimizing the limited resources available to increase tourism visitation and revenues.

Tourism succeeds when collaboration trumps self-interest, funding partners support priority initiatives, training support is provided when needed, and realistic time frames are set to achieve realistic outcomes. Done well, the competitiveness and appeal of the destination increases generating benefits for visitors, businesses and communities alike.

Opportunity/Recommendations

1. **DL, TN, IBRD, TCR & Municipal Councils:** Host information sessions in communities that want tourism as an economic driver. Present the TDVAA and the integrated approach to development to secure buy-in to the plan ensuring an understanding that each community can contribute, support and benefit. Local area champions will strengthen the ability to succeed within and between communities in Labrador through their understanding, engagement, support and stakeholder influence.
2. **DL, NG & IBRD:** Make an annual presentation on tourism and economic development collaborative investments at the Joint Council's Annual meeting as a key forum to provide progress updates on the implementation of the TDVAA and garner continued support. The first opportunity will be March 2015 to present the strategy and DL, at the earliest opportunity, should ensure a request is made to be on the agenda. If possible, ACOA, HNL and TCR should be invited to this session.
3. **DL & Municipalities:** Strengthen the relationship between Destination Labrador and municipalities by ensuring the understanding of the role a destination management organization provides and how this can assist tourism businesses in their community.
4. **DL, TN & Operators:** Take advantage of the annual national Tourism Awareness week in June to celebrate progress from the TDVAA and promote the value of tourism at the local level.

These recommendations support Goals 1.2, 1.3, 4.1, 6.3, and 7.1 of *Vision 2020*.

Finding #4: The Nunatsiavut Government's commitment to investing in tourism, in ways that strengthens the capacity of individuals, businesses and host communities, is starting to generate measurable results.

The Nunatsiavut Government (NG) has significantly invested in laying the foundation for long-term community tourism development since the land claims agreement was signed in 2005, creating an independent government within NL. Guided by an initial tourism strategy from 2008 to 2013, over $25 million of capital infrastructure investment has been committed to tourism development through to 2017 with the most significant amount ($16M) to build the first modern attraction in NG, the Torngâsok (Illusuak) Cultural Center in Nain. Additional funds to support product and market development, training, business development and marketing has resulted in more than 120 initiatives being launched and/or accomplished during this time period.

Accessible only by air, boat or snowmobile in the winter, tourism development is not about speed, volume and mass markets, it is about a careful strategic path of investment, building the tourism and community human resource capacity en route, supporting entrepreneurs, creating jobs and providing project funding.

The people of Nunatsiavut have much to be proud of, yet there remains much to be done to preserve and share the Inuit story with the world. Like the rest of Labrador, there are capacity challenges with infrastructure through to sustainable human resources and business development that must be slowly, sustainably addressed.

Currently the NG employs two full-time staff dedicated to tourism product and market development: a Director of Tourism and an Experience Development Officer. The Town of Rigolet created a new 2-year Tourism Manager's position in 2014; the mandate is to implement the new community tourism plan. As the southern most Inuit community and one of the gateway towns to the future Mealy Mountains National Park, Rigolet is poised for tourism development.

In northern Nunatsiavut, the Parks Canada's visitor experience staff for the Torngats National Park work with NG and TN to develop and deliver programs at the Base Camp and Research Station. NG Solutions – a tourism operator within the Nunatsiavut Group of Companies (NGC) also operates Labrador Air, Universal Helicopters and manages the Northern Ranger contract. NS Solutions is managed by a full-time staff person, employs 22 summer staff who are 100% Inuit, and is currently expanding their packaging and product offer with the Northern Ranger. Finally, a full-time person working with Parks Canada and NG has been focused on the story development for the future Torngâsok (Illusuak) Cultural Centre targeted to open in 2016.

To leverage the TDVAA for Labrador project, the Nunatsiavut Government invested in refreshing its tourism strategy to ensure alignment with the province, destination Labrador and funding partners so their needs and contributions to achieving the goals for Vision 2020 are integrated. The 2014 to 2020 Nunatsiavut Tourism Strategy, due for public release in August 2014, will set forth a new vision, mission and values that combined with five strategic pillars, provide the framework for prioritizing projects and investments that will generate the greatest return on investment. It defines their 'ideal guests', acknowledges the tourism investment cycle and is designed to be a living strategy.

Opportunity/Recommendations

1. **DL, TCR, HNL, ACOA, IBRD, Parks Canada, NG Community Councils:** Support the new tourism strategy and ensure the developments for the north coast occur in partnership and collaboration with the Nunatsiavut Government (NG) and Tourism Nunatsiavut (TN).
2. **HNL and IBRD:** Work with the NG and TN to support the more 1:1, customized needs for training required to help operators succeed.
3. **TCR, DL:** Remain in close contact with TN regarding the evolving status and progress of the major infrastructure projects and emerging market ready visitor experiences, so investments in marketing and promotions can by synchronized and coincide with provincial and regional marketing cycles.
4. **Parks Canada, IBRD, ACOA, TCR, NG:** Focus on funding projects that will build the capacity for developing visitor experiences, and the capacity of the communities, to optimize the new infrastructure with revenue-generating, high-value visitor experiences.

These recommendations support Goals 1.3, 4.1, 4.2, 4.3, 5.1, 6.1, 6.2, 6.3 and 7.1 of *Vision 2020*.

Finding #5: User-friendly customer profiles will help operators better understand Labrador's ideal guests.

Labrador has access to quality research information produced by the province, including the regional Labrador Travel Survey (2011)[8]. Additionally, because many of Labrador's major attractions are owned and operated by Parks Canada, the CTC's Explorer Quotient (EQ) research is the psychographic segmentation used to understand the traveller, which is also the customer profile information by the NG given their interest in international markets and their close alignment with the visitor activities associated with Torngat Mountains National Park.

The demographic profile of resident and non-resident travellers to Labrador reveals visitors have characteristics of guests willing to pay for quality visitor experiences, especially given the investment they have made to travel to Labrador. A need for more psychographic information surfaced that would provide greater insights and inform product development, packaging and marketing for businesses in general who do not have access to the EQ research, which requires a provincial or regional license.

Given most operators are small business operators and human resources are limited, the skills and time needed to analyze the major databases and create a profile for their business is limited as few have the research skills or resources to mount even small scale studies.

Opportunity/Recommendations

1. **TCR, CTC, DL, Parks Canada & Western DMO & NG:** Meet to determine the degree of access to the EQ visitor profile information that can be shared on projects that impact the core assets of the Western Field Unit, including Torngats and Gros Morne National Parks, Red Bay & L'Anse Aux Meadows National Historic Site, plus the other assets under the care of Parks Canada. By aligning with the core visitor type, Parks Canada is already working to attract visitors based on this research. This could shorten the time needed to get an understanding of the ideal guest; an approach that has been successful with the Louisburg NHS in Cape Breton NS.
2. **TCR:** Review the current research available to determine if customer profiles for Labrador (resident and non-resident travellers) could be produced for:
    - Winter sport-tourism visitors;
    - Once-in-a-life time visitors seeking culture and natural heritage experiences;
    - Northern coastal Pocket cruisers (Iceland, Greenland, Labrador, etc.), and forecasting for the future; and
    - RV/Caravans and long-distance travellers that will increase as the TLH journey gets on people's bucket lists, appreciating some who have spent one or two months travelling the Alaska Highway may well add Labrador to their bucket list once the road is completed and more visitor experiences are developed over the next few years. Ideally, this would be customer profile that includes insights on the demographics, psychographics, social-graphics and core benefits visitors are seeking.

    Examples from the CTC, Northern Ireland Tourism Board and more recently the Ontario Tourism Marketing Partnership could guide the content creation.
3. **TCR, HNL, DL & NG:** Identify any research gaps that could be built into the long-term plans for the provincial research agenda, and/or form the basis for a special study that targets specific needs in Labrador. Also, investigate if there are any simple, online tools that could be used by operators to collect information from their customers that feed into a database that could produce aggregate findings of benefit to all in the region on an annual basis.
4. **HNL, TCR & DL:** Host special workshops to train operators on how to use the existing research to impact their product development, marketing, pricing and sales and any new/emerging research that may be produced. TCR should also explore if additional research on the resident and non-resident leisure traveller could be conducted to learn

[8] Government of Newfoundland & Labrador. (2012, Jan.). *Labrador travel survey Final Report 2011.* Pg. 57. A study conducted by MarketQuest Omnifacts Research for the Department of Tourism, Culture and Recreation.

more about northern niche market travellers, those that enjoy arctic and sub-arctic destinations and the types of winter activities of interest.

These recommendations support Goals 3.1, 4.1, 6.1 and 6.2 of *Vision 2020*.

Finding #6: The profound difference between Labrador and the island has the potential to truly contributing in bringing the "Uncommon Potential" of NL's brand to life.

Newfoundland and Labrador has a powerful, award-winning brand that has raised the bar in destination marketing. Garnering domestic and international respect alike, the shift from selling products to telling unique, authentic stories of the destination has been impactful.

In Labrador, the stage is being set to tell stories untold and share legends that only few have heard. These stories have potential to engage a wide audience of travellers and move them along a new path to purchase. Communicating differences between Newfoundland and Labrador will be important to influencing future travellers' understanding or the travel experience in the north vs. the island.

Over the next three to five years, as the infrastructure investments are complete and the depth, breadth, quality and consistency of the visitor experience is enhanced annually, "New Chapters" of the NL tourism story will add diversity and increased appeal to the provincial and regional marketing opportunities.

Opportunity/Recommendations

1. **TCR, DL, IBRD, Parks Canada, NG & CTC:** TCR to organize a co-sponsored, two-part FAM trip in 2015 for the individuals collectively responsible for planning and marketing Labrador, NG and the Western DMO. View this as an investment, not an expense. The ability for the key marketers to meet, plan, leverage and have a collective strategy for marketing the Labrador Experience routes will have significant long-term gains and align those responsible with a collective vision.
    a. Part 1, in 2015, would involve travelling as a visitor to experience the route from Deer Lake to the St. Barbe ferry, then along the Labrador Coastal Drive exploring the tourism marketing potential in the coastal communities leading to Red Bay NHS as the iconic regional attractor, and concluding the journey in Battle Harbour for meetings to discuss the collective marketing opportunities, responsibilities and strategy for this experience corridor.
    b. Part 2, in 2016, would involve flight access into Happy Valley Goose-Bay and taking the Northern Ranger and travelling in the footsteps of the visitor along the coastal community sail and into the five communities in NG, ending up in Nain where the future Torngâsok Centre will be opened and the future Old Nain Town development area could be walked. From here, host meetings to discuss the collective marketing opportunities, responsibilities and strategy for this experience corridor.
    c. Conclude the investment meeting to discuss how to optimize the story development of Labrador over the next three years and start building critical awareness in core markets, particularly non-resident travellers, about Labrador experience now. Forecasting is also needed to understand what will be needed to tell Labradors' evolved story over the next decade as the product is enriched and transportation is enhanced.
    d. Part 3 involves long-term forecasting for 2016 or 2017 to stage a FAM trip along the TLH from Quebec to L'Anse au Clair. It is anticipated the TLH will be nearly 100% paved.
2. **DL, TCR, Parks Canada, TN & Western DMO:** Asses how to leverage the product development and marketing investments that will occur relative to attracting visitor to the three UNESCO heritage sites, future Mealy Mountains National Park and the Torngat Mountains National Park.

3. **DL& TCR:** Identify an individual within TCR's marketing group who becomes the Labrador specialist and can support DL by representing the Labrador product on the provincial sales team. Similar to the classic packaged goods model, the product specialist or product manager takes interest in the development and promotion of their particular product. Their first major task could be to organize the FAM Trip proposed for marketing stakeholders.
4. **TCR, DL & Western DMO:** Set baseline measures for capturing the metrics associated with the experience categories (e.g. number of communities involved, number of businesses impacted, number and type of options available to visitors, range of price points from free to high value, etc.). The commonality of the metrics between the two DMOs will be important given the visitor's journey shares a path between these two significant regions.

These recommendations support Goals 1.3, 3.2, 4.1, 6.1, 6.2 and 6.3 of *Vision 2020*.

FINDING #7: NUNATSIAVUT IS TAKING A LEADERSHIP ROLE IN DEVELOPING CAPACITY FOR AN ARTISAN NETWORK AND AN EXPERIENCE PROVIDERS NETWORK TO GENERATE OPPORTUNITY AND RAISE THE INTERNATIONAL PROFILE OF LABRADOR'S INUIT.

There are two multi-faceted capacity building initiatives emerging from the Nunatsiavut Tourism Strategy Refresh that will support a strategic focused approach to growing the human resource, visual and performing arts and experience provider capacity over the next decade. Benefitting the communities and local businesses at large, tourism will be a benefactor of both initiatives as the capacity to connect with travellers, create engaging authentic experiences to connect with locals are developed. The first initiative is larger than just tourism driving social and economic development benefits as well. The second is specifically targeted to increase the capacity for tourism products and services in Nunatsiavut.

#1: The Nunatsiavut Artisan Network (NAN)

This is a network that forms the catalyst for strategically developing the full range of talent, skills and retail products for Labrador Inuit. Focused on uniquely Labrador products (e.g. sealskin clothing from traditional patterns, soap stone carvings, Labradorite jewelry etc.) the network would support the development, marketing and sales of a wide range of Inuit art and support the artisans throughout Nunatsiavut.

#2: Experience Providers Network (EPN)

This is a network that is the catalyst for strategically developing the capacity of individual guides, story tellers, local area historians and elders to directly sell their services to visitors, or contribute to packages offered by tourism operators such as Adventure Canada, NG Solutions or a meeting organizer. Experience providers ensure the authenticity, connection to locals, personalization, rich storytelling and the sharing of traditional ways of life and Inuit heritage. The goal is to create a network of experience providers that deliver high value. Based on their knowledge of the customer will contribute to attracting a high-yield customer base and profits. In addition, experience providers will be paid appropriately for their contributions for direct-to-market sales and delivery, via the cruise ships, or in packaging with tour operators, airlines or hotels.

Opportunity/Recommendations

1. **NG & IBRD & NL Craft Council:** Investigate funding the development of a not-for-profit network that would coordinate the business interests of the visual and performing arts community to support the collective purchasing power, marketing, product development and training requirements.
2. **NG:** Investigate the potential for encompassing the development of the Experience Provider Network within the roles and responsibilities of the Nunatsiavut Tourism staff.
3. **NG & IBRD:** Invest in coaching artisan clusters in the business skills of positioning, selling and creating memorable visitor experiences that celebrate the culture, people and heritage of the Inuit. Consider aligning, on a contract basis, with successful businesses like the Gros-Morne Co-op for retail expertise, and a successful artisan, such as Molly White of Molly Made in Woody Point, Newfoundland, to help lead through examples.
4. **DL, NG & TCR:** Be prepared to include new visitor experiences into promotional activities as capacity is built and new products come on stream.

These recommendations support Goals 1.3, 4.1, 6.1, 6.2 and 6.3 of *Vision 2020*.

Finding #8: Outfitters are a major asset to Labrador's tourism industry; but their full potential is not being fully realized.

NL benefits from a widespread and positive reputation among Canadian and American anglers and hunters. Labrador, with its world-class brook trout, salmon, arctic char within its lakes, rivers and streams, is seen as one of the most attractive backdrops for trophy angling experiences.

This iconic, high yield tourism demand generator is Labrador's most developed tourism product that annually attracts high end angling enthusiasts that benefits operators, transportation providers and guides and provides on-going fodder for the media, blogs, photos and videos of enthusiastic travellers.

This important segment of NL's tourism industry is made up of outfitters who deliver expertise and a variety of services to those interested in these recreational pursuits. For more than 50 years, the Newfoundland and Labrador Outfitters Association (NLOA) has supported and represented the industry. It is recognized by the province as the lead sector organization for promoting angling and hunting outfitters within the province, and serving as an advocate for the sector.

There is however, at present, disconnect between Labrador based outfitters, the NLOA, TCR and DL when it comes to fully leveraging the opportunities associated with attracting more anglers to Labrador. This is an unfortunate situation as high-end angling adventures represent a huge business opportunity. Getting all stakeholders on the same page is essential if this valuable tourism asset is to be fully leveraged.

The TDVAA revealed a number of perspectives, listed here, for further consideration and discussion:

- The caribou moratorium in Labrador has resulted in the big-game hunting focus being primarily on the island, while Labrador is primarily focused on anglers;
- The creativity of some operators packaging with Universal helicopters to fly their high-end guests to Hebron and Battle Harbour offers a degree of customization that can be increased as the cultural product grows in Labrador and these high end guests, and repeat guests, can afford to take advantage of special experiences, purchase exquisite art, and influence a circle of travellers not targeted by typical marketing activities;
- There are any number of public outfitters (who sell to the general public) and private outfitters (who make their services available to a limited clientele), which creates confusion in the marketplace and puts outfitters at odds with one another limiting their ability to collaborate to compete;
- Some limitations of select operators that were identified restrict the potential and

reputation of the entire sector, including:
  - Unwillingness to adapt to changes in the marketplace, preferring to maintain a narrow customer focus rather than use their properties outside key fishing seasons for other tourism pursuits and making available, much needed quality accommodations in Labrador,
  - Not leveraging the social media opportunities available,
  - Guides not adapting to best business practices (e.g. smoking on boats, not wearing life-jackets),
  - Creating packages but not thinking through the differentiation aspects or broadening their market reach to the touring public for increased relevance and differentiation in the marketplace, and
  - Limited capacity to close the sale in a timely fashion that is aligned with today's consumer expectations;
- Concerns that some businesses are trying to compete on price over value and are missing the opportunity to differentiate their business based on the quality of the experience, connection to the local people, and access to relatively untouched waters;
- Destination Labrador receives requests to assist Outfitters with their marketing, however, NLOA has exclusive marketing rights to this sector;
- TCR is willing to assist outfitters however they would like to do so with the NLOA as the lead;
- The NLOA, as the "go to" organization to support and promote angling and hunting in the province is underfunded to do an adequate job;
- Labrador based outfitters are at odds with the NLOA in the context of a consumptive and non-consumptive hunting and angling philosophy; Labrador's outfitters perceive it is difficult for the NLOA to service operators who are at both ends of this spectrum and therefore, expectations are not being met; and
- A concentrated effort should be made to better understand the issues and opportunities surrounding the angling opportunity in the hopes that those involved can better work together in the future.

It is apparent dialogue between DL, TCR, IBRD, NLOA and perhaps HNL needs to take place. IBRD may be in the best position to facilitate such discussion. IBRD should be given the task to get angling based organizations and benefactors on the same page in relation to future Labrador centric opportunities and issues.

Opportunity/Recommendations

1. **TCR & NLOA:** Take the lead to get the appropriate participants at the table to figure out new and refreshed proactive solutions to leverage the high end angling market and facilitate positive and proactive strategies to leverage the important angler market for Labrador's outfitters. Look at companies that have successfully diversified their business over the years such as the Nimmo Bay Resort (www.nimmobay.com) in British Columbia or Aikens Lake Wilderness Lodge (www.aikenslake.com) in Manitoba, Artic Watch Wilderness Lodge in Nunavut (www.arcticwatch.ca), all recognized as Canadian Signature Experience[9] companies, to understand the critical decisions, investment and risk required for northern, rural and remote operators.
2. **TCR, DL, NLOA and Operators:** Determine if there is merit in profiling one element - Trophy Brook Trout – as the Labrador unique selling proposition (USP) for the region.

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[9] The Canadian Signature Experience program is a national designation for the quality of a visitor experience by the Canadian Tourism Commission that is recognized by the international tourism marketplace and provides a pool of businesses to profile the excellence and diversity of Canada's tourism experience. At the present time, only 168 individual experiences in Canada, representing all sectors of tourism have secured this status through an annual evaluation committee of private sector experts and CTC specialists. In Labrador, the only experience recognized at this time is NG Solutions 'Base Camp'.

3. **DL & NLOA:** Take on a proactive role in helping Labrador outfitters understand how to move beyond 'listings' to effectively convey the experience differentiation, enhancing the calls-to-action, and closing the sale relative to today's consumer expectations.
4. **TCR & DL:** Review the filters in TDMS to ensure that private outfitters are not listed on marketing communications.
5. **HNL, TCR, DL, NLOA & Outfitters:** Meet to discuss the potential for expanding the traditional focus of the Outfitting businesses to diversifying their product offer, extending their season, using their facilities for other tourism purposes. Appreciating only a selection of operators will want to embrace the *Dare To Be Different* philosophy; of those that will, DL can support these businesses through product development support. HNL could offer specialized training for this group, and together a cadre of Outfitters in Labrador could expand their offer in time for Canada's 150th celebrations in 2017 and have market-ready product to market.
6. **TCR & NLOA**: Seize the opportunity to review and implement new strategies that supports NLOA's mandate into the future to ensure expertise available to help guide future development and marketing initiatives.

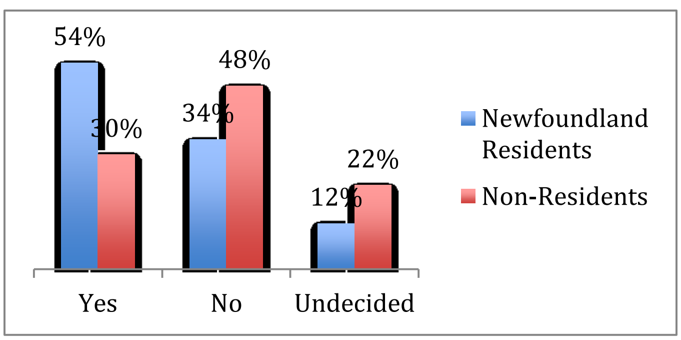
These recommendations support Goals 4.1, 4.3, 5.1, 6.1, and 7.1 of *Vision 2020*.

Finding #9: There's an untapped opportunity to respond to niche market demand and further develop winter tourism in Labrador.

Winter in Labrador is when Canada's 'true north strong and free' comes to life. It's a time when people who prefer winter activities head north to enjoy the snow and ice and all the sport and recreational activities available.

Fifty-four percent of islanders and 30% of non-resident travellers indicated they would consider a winter trip to Labrador (Figure 3).[10]

Figure 3 Interested in a Winter Labrador Trip



Source: Labrador Travel Study 2011, pg. 52.

March and April are reported as the best months to focus on; when temperatures can be milder and before the snow melts and the ice thaws. Every additional visitor who comes for snowmobiling, winter camping, cross country skiing, dog sledding and ice fishing adds business to a time of year where businesses have excess capacity.

Winter is a time when a number of high profile winter sports events and tournaments currently take place that drive national and international attention to Labrador through events such as Cain's Quest and the Labrador Winter Games. Nunatsiavut has piloted a high-end winter project at the Torngat Base Camp at

[10] Government of Newfoundland and Labrador. (2012, June). *Labrador travel survey final report.* (Pg. 52). A study conducted by MarketQuest Omnifacts Research.

a time when the Northern Lights are in their glory and the full experience of winter is alive and the operator is interested in continuing to pursue this market. Provincially, a number of regional hockey, cross country skiing and snow mobile tournaments and competitions all generate travel to and within Labrador and there is potential to grow visitation with some strategic development and support.

While winter tourism is a niche market, in a northern destination it is an integral part of the culture, lifestyle, heritage – and for some travellers, its charm. Consideration should be given to anchoring Labrador's winter tourism growth under a "sports tourism" umbrella. High profile events and tournaments not only attract participants and spectators, they help position the destination in terms for special events and competitions. For example, Cain's Quest speaks volumes about the quality snowmobiling options available throughout Labrador. The unspoken message to snowmobilers is that if Labrador's snowmobile experiences can support an event of this nature, it must be a great place for the recreational snowmobile enthusiast.

Opportunity/Recommendations

1. **DL, TCR (Recreation) & Municipalities:** Add the sports and recreation events to the TDVAA database to get a more holistic sense of the scope of winter activities taking place in Labrador that are not captured in TDMS (e.g. hockey tournaments) and contribute to driving visitation to and around Labrador. Once complete, assess the current and potential capacity for increased winter-sports tourism events and tournaments keeping in mind venue capacity and availability, volunteer complement and accommodation options.
2. **DL, TN, NG Solutions, Arctic Kingdom & Outfitters:** Meet to determine the potential to increase the high-end winter visitor experience at targeted sites in Labrador and Nunatsiavut to create new, inviting visitor experiences, new options for repeat customers, and drive business that will grow the season. Arctic Kingdom was identified as a key winter product partner in Nunatsiavut and could be a good company to invite to the discussion.
3. **DL, Operators, TCR (Recreation) & IBRD:** Identify sports leaders (individuals) in the communities where there is current critical mass of sports activities and then tap into this group's collective expertise to explore the possibility of growing their event or tournament through development of proactive sports tourism strategies.
4. **TCR & DL:** Continue to ensure winter tourism opportunities are part of the Labrador destination sell by leveraging the late winter activities as a reason to travel where market demand is demonstrated or can be cultivated.

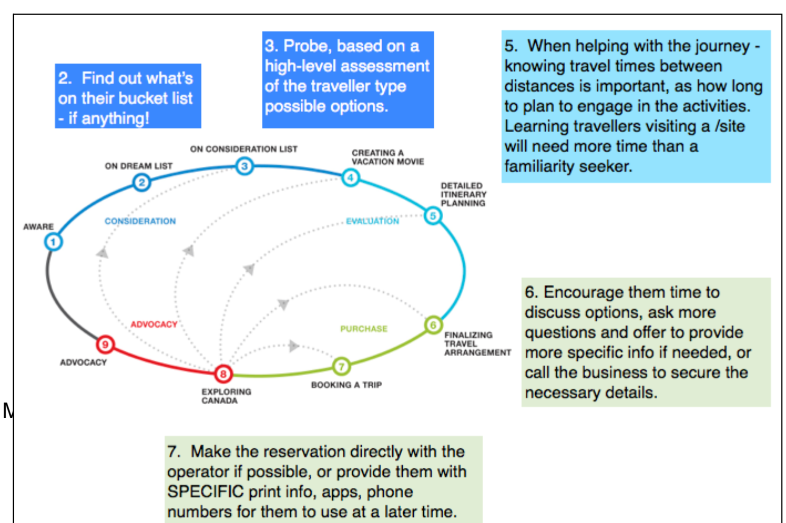
These recommendations support Goals 3.1, 4.1, 6.1 and 6.2 of *Vision 2020*.

FINDING #10: THE PROVINCE HAS THE POTENTIAL TO LEAD THE WAY IN LABRADOR WITH INNOVATIVE VISITOR SERVICING IN A NORTHERN CANADIAN CONTEXT.

Jurisdictions across Canada are examining how to evolve traditional visitor servicing that rely on a strong focus on Visitor Information Centres (VICs), print information and call centers to ensure they are meeting the needs of today's traveller. The advent of people travelling with mobile devices, an endless array of businesses providing online information, and a desire to be on or off the grid while on vacation, are a few permanent changes to visitor servicing that must be addressed.

What has not changed is the need for travellers to access quality information for planning their trip, gathering local area information when they arrive, and

Figure 3: VS contribution to the Path-to-Purchase



making that personal connection with a local person who is knowledgeable about the local area and region they plan to visit.

Visitor Services (VS) are a vital element of the tourism mix. They are an extension of the marketing department and can help generate and close the sale for operators based on their ability to align their knowledge of the destination and its product offer with the benefits travellers are seeking (Figure 4). Staff and volunteers provide the personal connection and local area information about the destination to guests to enhance their visit, connect with the hospitality of the region and maximize tourism business sales.

Labrador does not have a provincial Visitor Information Centre, nor does it need one at the moment. The region, however, does need to support the three regional centers and needs to be ready for expanded demand in the next decade as visitation increases.

For the immediate future, the potential for the province to take a leadership role to pilot a new collaborative business model, with minimal infrastructure and maximum connection capability for the future, is a real opportunity in Labrador – one that could have spin-off benefits elsewhere in the province.

Opportunity/Recommendations

1. **DL, IBRD, TN & TCR:** Meet to discuss the array of new visitor serving options being used in different jurisdictions to identify ones that would provide the best visitor experience for a rural northern traveller and develop a concrete list of options to be explored as the TLH is being completed and the paved highway from Happy Valley-Goose Bay to Red Bay is advanced. This could include ideas such as:
   - Partnerships with businesses, ferries, and airports in key locations where visitors have to stop to get gas or groceries or placed within the main community attraction, appreciating many of the towns in Labrador are small.
   - Service agreements for an information kiosk with Wi-Fi access to tourism information;
   - Explore other solutions such as QR Code Stations, designated Wi-Fi areas with a link to an online chat-line or personnel working in a provincial VIC; and/or
   - Information kiosks, a Labrador visitor portal; i.e. TripAdvisor account, a dedicated visitor information services website that encourages collaborative content generation from the visitor servicing network.
2. **TCR, NG & IBRD:** Provide special project funding to this initiative to invest in solutions and communities identified through the assessment process. This may involve phasing in, based on priority tourism corridors where it is most needed and the technology potential exists;
3. **TCR, NG with DL insights:** Revisit the current budget, allocation and resources provided to ensure the optimal type of visitor servicing, training, and appropriate visitor support is available, particularly as the TLH is opened and NG examines how to service visitor needs in their communities.
4. **IBRD, ACOA, TCR and the Municipality of Happy Valley-Goose Bay:** Begin discussions on how to enhance the visitor experience within the major gateway arrival terminal, building on the experience themes and priority stories for Labrador. This is the most important gateway and the potential for murals, arts, exhibits and the use of technology could greatly enhance the emotional connection to travellers arriving and departing from the airport.
5. **IBRD, ACOA, TCR, TN and Coastal Municipalities**: Led by IBRD, collaborate to develop a regional arrivals strategy for the many coastal communities where the main access routes are by water or plane. Determine the potential for enhancing the arrivals experience and partnering with the province on the visitor information and service needs like washrooms and Wi-Fi to create a quality welcome to guests arriving at a marine entrance, and the smaller airports.

This recommendation supports Goals 1.3, 2.2, 4.2, 5.1 and 6.3 of *Vision 2020*.

FINDING #11: THE ONLINE PRESENCE FOR LABRADOR TOURISM BUSINESSES REQUIRES IMPROVEMENT; BUT KEEP IT SIMPLE.

In general, tourism business in Labrador are represented online either through a website, Facebook or TripAdvisor; few optimize all three. Telecommunication issues with Bell Aliant presents some limitations along the south coast, but on-going efforts are being made to advance that regional capacity.

There is a positive number of regional destination websites, the two strongest being DL's and NG Tourism that are professionally maintained. The others are volunteer-operated so subject to limited resources, and one is focused on immigration, so it could be confusing for visitors who arrive on the site. The use of destination websites in Labrador makes sense given the regions geography, community sizes, and human resource capacity of businesses. Municipalities overall are quite weak, with Rigolet surfacing as one of the better ones reviewed.

Websites: Tourism Businesses and Municipalities

In Labrador, 66% of infrastructure-based businesses have a website, 34% do not, which means most travellers will not be able to readily locate the business. Of those with a website, 59% have a clear call to action, 31% provide information on 'how to get here', 52% accept credit cards, 59% accept phone or email reservations but only 13% accept online reservations, 19% have visitor testimonials, 43% include photos of visitors engaged, 66% have infrastructure imagery, 17% a travel trade page, 1% a blog, and 6% a link to their TripAdvisor page. These results overall are higher than the results collected in the Eastern region.

For visitors who may search the name of a town first to find what is available in the community and region, 31% of municipal websites have a basic tourism section. And 88% have 'how to get here' information. The five destination websites on the other hand, 100% have websites, a call to action for booking, how to get here information, 40% carried visitor testimonials, 80% photos with visitors engaged and email/phone bookings.

Facebook, TripAdvisor and Blogs: Operators

The potential to use mega social media tools such as Facebook and TripAdvisor creates opportunity and angst for tourism businesses. The reality, however, it is a world where, increasingly more, the traveller finds benefit in browsing key social media sites to inform their travel decision-making. To not be in the conversation is a missed opportunity. To allocate the staff or volunteer time to engage in the conversation is important - the frequency can be controlled by the business.

The majority of tourism businesses are not leveraging the power of TripAdvisor or Facebook with their guests and prospects. Only 11% have a TripAdvisor account, 18% a Facebook business account and where companies have these accounts, they are not linked together with their website to make it easier for the traveller to find additional information quickly and easily.

On TripAdvisor, few businesses post professional photos of their infrastructure, activities or guests (8%), and very few visitors have uploaded their own photos - which can be encouraged by the business with their guests. For those with accounts, however, very few are engaged in responding to their guests after the guest posts a comment with any acknowledgement or feedback - rather it is a one-way conversation where the guest takes the time to share their thoughts and the business does not engage.

The voice of the customer continues to grow on online channels. It is imperative for tourism businesses to determine which conversations they will benefit from the most by committing to a regular, ongoing engagement with travellers.

Opportunity/Recommendations

1. **DL& HNL:** Use the 2014 data produced from this study on tourism business and municipal websites as a benchmark to set 3-year targets to improve performance in all categories.

Mobile Friendly and Responsive Websites: Tourism Businesses and Destination Websites

2. **Operators:** The low hanging fruit is for operators to audit their websites in 2014 and ensure the basic, expected elements are there - most importantly mobile friendly, a clear call-to-action, and a Google map link, an ability to talk to a person year-round and make a reservation. The best experience may exist, but if a traveller cannot book, they cannot buy - particularly non-resident travellers who are not familiar with all the businesses and may be travel planning during closed or shoulder seasons. For the fall-winter of 2014 - 2015, operators should examine their budget to determine where strategic and prioritized investments in time or money would be required to improve their online presence.

3. **DL & NL:** The provincial website (www.newfoundlandlabrador.com) is the main website for the province. Relative to visitors accessing additional information needed for their journeys in the north, **two destination websites are serving an important function** – DL's (www.onlylabrador.com) and NG's (www.tourismnunatsiavut.com). They should continue to be supported. They provide regional identity and can list additional information needed for northern travellers such as services in each town such gas stations, important seasonality and hours of operation for core businesses like grocery stores, locations of medical services along the Trans-Labrador Highway, where to access Wi-Fi, what happens in variable weather with the airlines and ferries, wildlife watch and advisors, and links to the calls-to-action for operators. These details do not exist on the provincial tourism website and in remote areas, where distances between services is very important. Alternatives could be explored such as a strong TripAdvisor site, Facebook page or destination Blog operated by the DMO however this may not be in the best interest of travellers needing information en route, travelling long distance, into remote communities, impacted by weather and the many other unique aspects of a northern destination. The alternative would be for the province to broaden its content focus and allow the region to add this auxiliary travel information, complete with real-time updating capabilities.

4. **Operators:** Invest in high-definition images that portray the emotional and physical connection - the people, places, and ways the guest can engage.

5. **IBRD, HNL, TCR, ACOA, TN & DL:** Ensure operators are aware of the existing programs that would assist them in creating a basic professional mobile friendly and responsive website or a more affordable internally produced WordPress or equivalent site. Further, ensure operators are aware that having an online presence is a requirement of the Newfoundland and Labrador Tourism Assurance Plan and therefore vital if they are to be included in provincial marketing and promotional initiatives and membership/partnership with the provincial Destination Management Organizations or Hospitality Newfoundland and Labrador. Essential to this program would be access to training to ensure once a physical site exists; the commitment and skills are there for basic updates (text, images, and videos) on an ongoing basis.

6. **Municipalities:** Building a 'tourism website' is not recommended, for this is not the core business of a municipality. Effort should be made to ensure a tourism webpage exists with links to tourism businesses in your community, these websites remain up-to-date, and that the link to the provincial tourism website (www.newfoundlandandlabrador.com) is well positioned, along with links to the community tourism businesses.

7. **Province, HNL & Others:** Revisit the content for online training programs being offered to ensure they are reaching the operators most in need, and if needed, target the invitation to engage a larger percentage of operators. Also, ensure the program leads to some tangible results - potentially through an incentive program whereby if X % of the objectives is implemented, Y% of the course fee for participation is returned to the individual/business. The more operators who choose to engage, the more this contributes to the provincial marketing voice.

Facebook, TripAdvisor and Blogs: Operators

8. **Operators, HNL, DL, & TN:** This is the weakest area of online presence, and there is a lack of understanding with operators of the value of these distribution channels. Simple training in the basics and help establishing a presence should be a high priority. The training must address the

fear of the unknown, online time management with communications, responding to negative and positive comments, how to use the sites to drive the conversation and, as appropriate, the sale. DL is launching a destination TripAdvisor account which will be an enhancement, yet to be fully beneficial, it needs to link to the operators in the region to be of greatest value to travellers.

Online Booking Engine

9. **DL & Operators:** The capacity of small businesses in rural areas to stay on top of technology is extremely limited as consumer expectations continue to soar. As well, the time, skills and knowledge of small businesses to research online booking engines such as www.bookeo.com and implement, what for the tech savvy may be quick and easy tools, is a challenge for many businesses. There are many options in the marketplace and the government does not want to compete with online booking engines. To assist operators and generate a commission-based revenue for DL, they should determine which operators would be interested in collaborating to establishing this regional capacity.

This recommendation supports Goals 3.2, 5.1, 6.1, 6.2, 6.3, 7.1 and 7.2 of *Vision 2020*.

FINDING #12: THERE IS AN OPPORTUNITY TO IMPROVE THE FOOD AND BEVERAGE OPTIONS IN LABRADOR BUT THE OWNERS/OPERATORS FACE A NUMBER OF CHALLENGES.

An essential, social and enjoyable activity when travelling is eating! Beyond the survival requirement, experiencing the culinary delights of a region provides Labrador restaurants with a way to connect guests to the food traditions and tastes from the region. Culinary tourism is now an established movement within the tourism industry and many national, regional and local tourism jurisdictions have active culinary tourism development strategies in place to ensure the taste experience contributes to the memories of a traveller's journey.

While some food and beverage operators in Labrador use local foods and authentic Newfoundland or Labradorean recipes, the dining reality offered does not align with visitor expectations. This is not an easy situation to remedy as restaurateurs face a number of challenges; the most significant being finding qualified kitchen staff and accessing the types of foods guest may enjoy, at a price and volume that can be profitable.

Opportunity/Recommendations

1. **TCR and the Restaurant Association of NL:** Meet to discuss how the databases could be integrated, or at a minimum, review the variables in the E-dining databases with the TCR research team to ensure the nuances important to travellers are captured.
2. **DL, TN, TCR & HNL & Restaurant Association of Newfoundland and Labrador (RANL):** Best practices, culinary retreats within the regions, mentoring programs with Red Seal chefs in order to create new menu items and redesign existing offers needs to be explored. In addition celebrate and promote the availability of local food and beverage options available to guests and at the same time encourage more food and beverage providers to adopt this approach in the preparation and delivery of their food and beverage experience; learn practices from others like the Ontario Culinary Tourism Alliance www.ontarioculinary.com.
3. **HNL, RANL, Bonavista Institute for Cultural Tourism (BICT), TCR, and Food and Beverage Operators**: Immediate attention needs to be directed at identifying and understanding the challenges facing the food and beverage sector in the region and the impact these challenges are having on the guest experience. With this understanding, immediate steps must be identified and actions implemented to address areas of concern. Focus must be directed at improving food quality, consistency and service delivery.

This recommendation supports Goals 3.1, 4.1 of *Vision 2020*.

FINDING #13: EFFORTS TO PROTECT THE NATURAL ENVIRONMENT AND CULTURAL TOURISM ASSETS EXIST IN LARGE PART BECAUSE OF THE DUE DILIGENCE OF PARKS CANADA, THE NUNATSIAVUT GOVERNMENT AND NON-GOVERNMENT ORGANIZATIONS IN LABRADOR.

Various organizations have a vested interest in ensuring that the protection of Labrador's natural and cultural assets is a priority through sustainable management practices and that these special places are preserved for future generations. Nunatsiavut Government is establishing its own archaeology policies, which considers tourism for land within the Inuit Land Claims agreement. For lands in the Labrador settlement areas, a partnership between NG and the provinces manages the decisions made for the lands. Parks Canada has long-standing environmental and heritage policies and also takes a proactive approach to the natural and cultural asset management as part of their standard practice while others focus on this element as part of special project initiatives. Non-governmental (NGOs) protecting the interests of a range of assets, such as the Point Amour Lighthouse and facilities, the Gateway Visitor Information Centre in L'Anse au Claire restored church, the Pioneer Footpath, Battle Harbour's Historic District and Labrador's Heritage Museum, are done through dedicated volunteers and local authorities.

The delicate balance of proactively identifying where to, and not to, develop tourism opportunities is vital to the long-term cultural and ecological integrity of the region. Protecting these assets and developing tourism in a responsible manner will serve the destination well, be respected by visitors and ensure the longevity of the destinations ability to compete on a global scale.

Individual operators, TCR, HNL, DL and IBRD have the opportunity to ensure Labrador's tourism stakeholders consider the impact of their activities on the natural and cultural assets. Protecting their relevance and significance by responsibly developing visitor experiences connected to these essential and unique assets but with the protection of vulnerable environments in mind is important today and into the future.

Opportunity/Recommendations

1. **Tourism Board:** Consider broadening Goal 4.3 within Vision 2020 from being a leader in environmental sustainability, to one that acknowledges the three core elements of sustainability: people, planet and profits. In support of this, formally acknowledge and align with the 2005 TIAC/Parks Canada's Code of Ethics and Guidelines for Sustainable Tourism as a foundation that balances economic objectives with safeguarding and enhancing the ecological, cultural and social integrity of Canada's heritage.
2. **DL & NG:** Take a leadership role in recommending that operators and TCR adopt the 2005 TIAC/Parks Canada's Code of Ethics and Guidelines for Sustainable Tourism, which HNL adopted in 2006 or identify if there are newer philosophies in the market that would be of greater value. The Nunatsiavut Group of Companies (NGC is developing a social corporate responsibility policy for their businesses. There may be opportunities to leverage the learning from this project in ways that help tourism businesses in NG and Labrador.
3. **Operators:** Incorporate educational elements and sustainable businesses practices into their activities and programs in ways that create appreciation, understanding and "A deep emotional motivation to experience new people, cultures and place," that responds to demand for unique, high-quality experiences, even at a premium price for cultural and natural activities.[11]
4. **NG:** The new Tourism Strategy includes a recommendation to formally adopt the practice of proactively engaging archeologists at the product concept stage to compliment standard environmental assessment practices; an advisable approach for other Labrador tourism developments.
5. **TCR, IBRD, ACOA & Municipalities:** Ensure the commitment to sustainability (people,

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[11] Government of Newfoundland and Labrador (2009). *Uncommon Potential: A Vision for Newfoundland and Labrador Tourism.*

planet and profits) is part of every project funded. Specifically, infrastructure projects (new or restored heritage and trails) should provide evidence of raising the bar on the visitor experience by identifying the activities and programs for target markets that will generate demand at a higher fee for the experience. This could involve a review of, and amendment to, funding applications.

6. **HNL, TCR & Province:** Revisit the concept of developing a tourism resource management set of guidelines or principles to ensure the protection of high-value tourism assets and the economic value they bring to the province.
7. **NG:** Continue to develop the policy base for the social, cultural, environmental and archeological protection and presentation of your heritage and natural assets.

These recommendations support Goals 1.3, 4.1 and 4.3 of Vision 2020.

Finding #14: "Tourism in Labrador is not just about sustainability, it's about survivability." Dare to be different with innovative projects and contract-based approaches to investing in tourism development.

Sustainable business practices are at the core of all product development and experiential tourism whether businesses follow the triple bottom line (economic, environmental, social). Beyond the internal practices a business can adopt are the elements of survivability described in Labrador: low visitor volume, upward pressures on price due to the growth in the resource industry, ferry access, and lack of accommodations to retain guests, to name a few.

Labrador is significantly larger than the island of Newfoundland. Its inhabitants are dispersed throughout the north, south, west, and central areas in communities with relatively small populations that will likely always have lower visitation than communities on the island. The bottom line – there is only so much capacity within each community, and if current businesses close, or non-profit organizations cannot afford to keep the doors open, the potential to grow tourism in Labrador will be negatively impacted.

While tourism is in its infancy, the volume of visitors is lower than most businesses would like, threatening the very viability of those passionate about welcoming visitors to Labrador.

In Nunatsiavut, stakeholders commented: *"Tourism can only succeed, if we have healthy communities and businesses survive."* On the south coast we heard *"If we had just 1000 more visitors each year crossing from St. Barbe, it would make the difference between struggling to stay in business, and making a decent living from tourism."*

There are several factors that vary from business-to-business and town-to-town contributing to this state. Those identified include:

- Municipalities having a limited understanding of what tourism really is, and how to support it;
- Cruise NL no longer supporting cruise readiness and shore excursions development, communities do not have the expertise to understand the opportunities, how to negotiate, what standards are required;
- Businesses are unable to secure or afford insurance given the short operating season and probably profit margins with current visitation levels;
- Lack of understanding of how the industry works, how to get to market, learning and staying on top of technology and with limited human resources and skills;
- Challenges getting to markets, knowing the customer, knowing where the markets are, and rules of engagement;
- A real appreciation of how different Labrador is from the island;
- Cost of transportation;
- Communication limitations on the south coast with Bell Aliant;
- Limitations in the quality of accommodations, but the risk being too high to invest to get a decent return on investment; and
- Limited labour pool.

Opportunity/Recommendation

1. DL, TCR, HNL, ACOA, IBRD, TN & Operators: Determine the answer to three questions:

- What does success look like in a low-volume destination with significant iconic tourism assets in remote areas?
- Should hard visitation targets be set, e.g. 1000 more visitors along the south coast, 50 more high-end visitors paying $10000 to $25,000 per week to drive the revenue/yield potential from both ends of the 'able to pay' spectrum for visitors?
- What does investment look like relative to the inter-dependence in growing community capacity, economic development and tourism? Are there targeted initiatives where inter-agency collaboration and funding could generate stronger results for tourism operators so visitors benefit and the appeal of the community is enhanced, new guest revenues are generated?

2. TCR, ACOA, IBRD, Parks Canada & NG: Invest in catalysts for change, such as existing business who are striving to do their best to grow tourism. For example, along the south coast where the visitor journey needs to be enhanced, what if a project provided $5,000 to $15,000 to each of three or four businesses, who could define a series of business opportunities to 'collaborate to compete' and need to have their time off-set for development. Like consultants, deliverables would be required – the primary being new product to market. They would have a vested interest in success; the additional visitors they would bring indirect benefits for the region. Three projects that could benefit from this type of an approach immediately would be:

- The visitor journey along the South Coastal Labrador Drive from L'Anse Aux Clair to Battle Harbour. This includes the enhancement required to encourage more visitors to travel up the Viking Trail on the island, cross over, and then carry on along the Southern Coastal Labrador Drive. This would be done in collaboration with the Western DMO and Parks Canada;
- The east-west visitor journey along the Trans-Labrador Highway; and
- The north-south visitor journey along the coastal waters via the Northern Ranger.

3. IBRD, TCR, ACOA & HNL: Funding partners regionally and provincially should review their current programs at both the regional and provincial level to determine if they are yielding the desired results?

- Could program criteria be tweaked to enhance the likelihood for success? For example, give priority to infrastructure projects that also demonstrate the intent to develop product and diversify revenue streams based on activities with the asset, and people/programs that offer the more specialized, experiential travel opportunity and command a higher price point.
- Is there another business model that has been successful, like Gros-Morne Co-Op that has successfully leveraged millions of project-funded dollars for tourism development in Gros Morne? Could something similar work in Labrador?
- Invest in initiatives that foster sharing and leveraging of human and physical assets; co-creation, co-investment, and risk-sharing.

These recommendations support Goals 1.3, 7.1 of *Vision 2020*.

Finding #15: There is a rich resource of reports, plans and research studies available but Labrador would benefit from some additional, targeted research.

The depth and breadth of information sources provided as part of the secondary data gathering process was vast. And with the exception of studies pertaining to sustainability and the management of natural resources a solid foundation exists. That being said, when a provincial or national research lens is taken, some of the unique informational needs in a northern sub-arctic region may not have the degree of insights needed to help guide informed decision making.

For example, anecdotal evidence emerged from stakeholders in TCR and industry that the resource industries are occupying accommodations; this has the potential to impact upward price increases and decreased visitor availability. However, there is no research that was provided for review that delves into that critical division, and the choices hoteliers are making relative to the percentage of rooms the provide regularly, or on a block booked basis for resource workers. As well, concerns were raised that advancing the interests in winter sports tourism could lead to a conflict of space for limited accommodations between athletes and guests in host communities – again, anecdotal and no research to help confirm if this is a challenge or not.

A second example of where additional research could benefit this northern region is customer profiles on the northern arctic and sub-arctic travellers – visitor who prefer the lure of winter to the beaches of Mexico. Comparisons with other northern destinations such as Nunavut, the Northwest Territories, Yukon, Alaska, Greenland and Iceland for tourism in all four seasons would be extremely valuable to helping businesses understand their niche market opportunities better. It may also foster new marketing approaches to increase the ‘lure of Labrador’ to untapped audience.

A bibliography with the 194 documents reviewed for this study is appended and the documents organized and residing with DL, HNL and TCR. Additionally, the E-dining and TDMS databases were accessed to provide primary data and extract specific tables.

Opportunity/Recommendations

1. Anyone looking to invest in a new report/study: Review the TDVAA Labrador bibliography created for this project to first determine if information already exists that could inform decision-making and future investment or other actions.
2. **TCR:** Conduct a special purpose study on accommodations to determine the impact of the resource industry on the availability of rooms, if there is an impact on price point, if operators are block-booking inventory making it unavailable to travellers, the availability of accommodations in smaller communities when special events drive significant visitor numbers to a community. Consideration should also be given to gathering qualitative insights into the challenges and solutions and develop a suite of solutions from unique private/public partnerships, to Air B&B, to hostelling – a full range of growing evolutions in the marketplace. This issues was raised in Eastern as a minor concern, it was raised as a major concern in Labrador.
3. **TCR:** Conduct a special purpose study to gain customer profile insights into the niche market travellers that are known to be attracted to Labrador including:
    - Adventure cruise guests vs. major cruise destination travellers vs. tourists on the Northern Ranger;
    - Visitors that choose sub-arctic and arctic destination as their travel preference and why;
    - The activities enjoyed by the 54% of Newfoundlanders and 30% of non-residents who are interested in a Winter trip to Labrador;
    - Visitors currently travelling for a day to get to the Straights, to gain insight into why they only stay a day and what is needed to increase the length of stay; and
    - Insights into travellers who seek out and travel to UNESCO World Heritage sights as a major travel motivator.
4. **TCR:** While exploring the decision to purchase access to all or some of the CTC EQ under their new model for accessing the information, consider in this costs the additional potential for Prizm geo-targeting research that is also available on a pay for play basis.

These recommendations support Goal 3.1 of *Vision 2020*.

Finding #16: TDMS and E-dining databases have limitations, which if addressed, will benefit visitors, operators and the province in achieving the goals of Vision 2020.

The Tourism Destination Management System (TDMS) is a sophisticated tool that allows tourism businesses to annually input information about their business that translates into online marketing opportunities and provides the province and visitors with important information about the company.

Principally designed to capture information relevant to consumers, it is also a source of business-to-business insight for product partnering, packaging, and the travel media and travel trade. As a business is encouraged to raise the bar with experiences that command a higher price point - access to experience providers (program based operators/individuals) that can provide this service to a hotel, tour operator, park, festival, restaurant, museum or heritage site becomes valuable. Currently, this type of information is not captured in TDMS.

At the heart of future enhancements is shifting from a controlled approach whereby the province is the only organization to monitor the quality and currency of the TDMS, to moving to a defined, designated role by the regional DMO's who are closer to the stakeholders and can contribute to ensuring the accuracy of data provided. In the end, the database is more accurate and the visitor is getting more accurate information that will inform their travel decisions and ideally turn prospects into visitors.

The tourism industry relies on the RANL's E-Dining database to communicate the food and beverage options available to guests. This database is populated by individual businesses. However there is inaccuracy between what was reported by RANL as food options vs. what stakeholders described as options within their restaurants. Most specifically, for vegans and vegetarians the fact a salad exists on the menu does not make it a restaurant that offers this type of food preference. As food options (e.g. gluten free, heart healthy, smaller senior's portions) become increasingly important, businesses need to be educated about this importance of this information and encouraged respond by submitting the details.

Opportunity/Recommendations

1. TCR & RANL: Meet to discuss how the databases could be integrated, or at a minimum, review the variables in the E-dining databases with the TCR research team to ensure the nuances important to travellers are captured.

2. TCR: As the discussions continue regarding the updating of the TDMS system, the following issues and opportunities were identified in Labrador that should be factored in to the discussions:

- A new variable for Festivals & Events that indicates if it a 'community focus' (e.g. local area annual polar bear swim) or a tourism draw (e.g. the Trapline Marathon);
- Add program-based variables to enable experience providers to be captured in the system. Some may have a direct consumer offer (e.g. artisans, musicians); others may merely provide a business-to-business opportunity (e.g. storytellers, fishers, elders) that could add value to product development that requires people engagement to raise the bar on the visitor experience;
- Add the ability for accommodations and outfitters to identify if their property/product is available for the general public or private access only (e.g. Dexter Inn and Suites is called a hotel to access the land, but the rental units are only for employees in the resource sector and not available for visitor bookings);
- Some business in TDMS are not operating, others in operation are not in TDMS. DL is aware of these but the data entry system does not allow for real-time regional collaboration by the DMO to assist operators in keeping accurate information in the system;
- Some operators submit manually to TDMS due to frustrations with the online system, this is expensive on human resources for the operator and TCR;

- There is no easy password retrieval, something that is a norm and usually managed within seconds for many online platforms;
- DL's count of licensed properties is higher than that in TDMS;
- An annual call-to-action to update TDMS is not in sync with current real-time systems, thus limiting the accuracy for both businesses and travellers alike;
- There is no category for gift/souvenir shop – one of the most common types of businesses in Labrador catering to tourists; and
- Discrepancies between TDMS and E-dining regarding rural vs. urban designations for cities like Labrador City and Happy-Valley Goose-Bay.

3. RANL: Consider enhancing the descriptions attached to core variables such as vegan, vegetarian, heart healthy foods, etc. to ensure when operators indicate 'this is available' it meets the expectations of the customer.

This recommendation supports Goal 3.1 of *Vision 2020*.

Finding #17: Amend five vision 2020 goals to optimize the investment focus needed to achieve the desired outcomes.

The *Vision 2020* strategic directions are now five years old and a few of the original goals are narrow in scope. This could limit the priority for investment as the government and industry collaborate on doubling tourism revenues in NL.

Opportunity/Recommendations

1. **Tourism Board:** Consider amending five *Vision 2020* goal statements as follows:

Goal 3.1

- From: Develop and implement a research strategy and plan that provides industry and government with relevant and timely information and analysis.
- To: Develop and implement a research strategy **and target investments towards research** that provides industry and government with relevant and timely information and analysis.

Goal 4.1

- From: Develop and implement an experience strategy that resonates with sophisticated travellers, reinforces our unique brand, and increases our return-on-investment
- To: Develop and implement an experience strategy that resonates **with non-resident and resident travellers,** reinforces our unique brand, and increases **the return-on-investment for businesses and the return-on-emotion** for visitors.

Goal 4.2

- From: Continue to improve government-owned tourism infrastructure.
- To: Continue to improve **the visitor economy by improving the infrastructure, activities and programs that will increase the appeal of the destination.**

Goal 4.3

- From: Be a visible leader of environmental sustainability.
- To: Be a visible leader of **responsible, sustainable tourism development focused on people, planet and profits.**

Goal 7.2

- From: Focus on efforts on attracting and retaining a skilled tourism workforce.
- To: Focus on efforts on attracting, **training,** and retaining a skilled tourism workforce.

This recommendation supports the overall ability for *Vision 2020*'s product development objectives to be realized.

4. Informing the Findings

The Big Land. Canada's North. A place where Canada's ancestors have lived on the land for a millennia. Destination Labrador[12] describes the appeal most eloquently:

"Nowhere is as far from everyday life as Labrador. Unspoiled by anyone, it's one of the last untamed places left on earth. Paths un-walked, mountains unclimbed, and beauty untapped — that's Labrador's tourism appeal captured in a few sentences. And while it's no easy journey, it's worth it, because only the boldly adventurous can claim to conquer Labrador."

"Labrador's embracing adventure and history is divided into two periods: before a visit and after. From traditional Inuit ceremonies to the shores where Vikings claimed this continent, it's a land draped in culture. Walk across 9,000 years of history and hear the stories of generations past in the surrounding silence. Cast a line into still water and challenge nature to fight for your newest trophy. From awesome panoramas to the thrill of the hunt, Labrador's grace is impossible to ignore. Labrador has the power to challenge you forever."

Occupying an area of approximately 625,000 sq. mi (1,620,000 sq. km), Labrador's highest mountains are over 5,000 ft. (1,520 m). Its coast is lined with islands and it forms the eastern most portion of the Canadian Shield.[13] Though Labrador's land mass is twice that of the island of Newfoundland, it has only 8% of the province's population.

The aboriginal peoples include the Nunatsiavut northern Inuit, the southern Inuit-Metis of Nunatukavut, and the Innu.

The non-aboriginal Labrador population began settling in Labrador when the natural resource developments of the 1940s and 1950s were established. Before this time, very few non-aboriginal people lived in Labrador year round. The few European immigrants who worked seasonally for foreign merchants and brought their families were known as *Settlers*.[14]

The Big Land's rich history shapes what it is today.

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[12] www.destinationlabrador.com/guide

[13] http://www.merriam-webster.com/dictionary/labrador

[14] http://en.wikipedia.org/wiki/Labrador

In the context of destination development, Labrador's potential over the next decade is significant.

There are four sub-regions, each with a unique cultural history and foundation of tourism assets. Developing the stories of each region will add to the diversity of the lure to Labrador, given the small communities and limited populations. In time, and once sustainable capacity, product availability and consistency is expanded, the destinations appeal and competitiveness will be enhanced. Developing tourism with a sub-regional emphasis is important due to the limited transportation corridors, air, ferry and cruise realities that dictate in large the visitors options for a journey through Labrador.

4.1 The Tourism Barometer

Over the past six decades, tourism has become one of the largest and fastest growing sectors in the world. Tourism is a trillion dollar global business that sees tourists spending $3 billion a day, that's $2 million a minute and accounts for one in every 12 jobs worldwide.[15]

The demand for travel continues to increase and the competition for visitors is fierce, particularly with emerging destinations, some of which are increasing at a rate 13% per year. Despite a global economy in low gear, an additional 52 million tourists traveled worldwide in 2013, bringing the total number of international overnight travellers to 1.087 billion. This represents a 5% increase over 2012, above the 4% long-term trend projected by the United Nations World Tourism Organization and well above Canada's 1.7% growth rate in 2013.[16]

> *Many Canadian companies choose to do business in the same markets they've operated in for years … Working with familiar clients and markets is a comfortable option, and in the short-term, it may reduce risk … but over the long term, playing it safe can cause companies to lose their edge.*
>
> *Deloitte's Passport to Growth (2013)*

In Canada, tourism is an $84 B dollar industry representing 2% of GDP. In 2013 it generated $21.3 B in tax revenues, employed more than 618,300 people in over 157,000 businesses and all major national tourism indicators increased including visitation (+2.9%), tourism total spending in Canada's 10 leisure markets (+4.6%), arrivals (2.9%) and employment (2.6%).[17]

Canada's occupancy rate recorded a modest increase of 1 point to 62.8%. Seven provinces saw higher occupancy, with Northwest Territories registering the largest increase (+5.5 points), followed by Alberta (+2.4 points), Newfoundland and Labrador (+1.6 points) and British Columbia (+1.6 points). Ontario's occupancy grew by .8% to 62.4%. The national average daily rate improved to $132.53, up 2.2% compared with 2012. Northwest Territories, British Columbia, Alberta, Quebec, Newfoundland and Labrador posted higher rates than the national average daily rate.[18]

Travel from Canada's core European markets was relatively flat in 2013 compared with the previous year. The UK (-1.3%) and Germany (-0.1%) saw modest declines, while France (+0.9%) came out slightly ahead. Overall arrivals from Canada's emerging and transition markets grew year over year by 7.4% in 2013. The best performers were China (+22.3%), Mexico (+6.3%) and South Korea (+3.3%). At year-end 2013, arrivals from secondary markets were mixed: Hong Kong (+7.5%) and Taiwan (+16.7%) expanded,

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[15] Canadian Tourism Commission. (2013). Annual Report, May 2014.

[16] World Tourism Organization. (2013). *UNWTO Tourism Highlights, 2013 Edition.* (pg. 2.) Purchased from http://mkt.unwto.org/publication/unwto-tourism-highlights-2013-edition

[17] Tourism Industry Association of Canada. (2013). Gateway to Growth: Canadian Tourism Industry Annual Report.

[18] PKF Occupancy Monitor, Ontario, 2013

while the European markets of Netherlands (-2.9%), Spain (-2.7%), Switzerland (-1.3%) and Italy (-0.5%) declined compared with 2012.[19]

US residents took 12 million overnight trips to Canada in 2013, up 1% over the previous year. Overnight air arrivals (+4.9%) outperformed all other entry modes. The economic challenges the US has experienced in recent years had a noticeable impact on international travel, which fell on average by 2% per year from 2007 to 2011. As the economy rebounded in 2012, recovery was evident in the tourism sector as well as international travel grew 3%.

Over half of Americans' international trips are within North America, with Mexico being the destination of one-third of all US travellers. Unfortunately, Canada's share has declined steadily over the past decade, falling from 28% of total international volume in 2002 to 20% in 2012.

Despite the decline in visitation, the US remains Canada's top source market, with 11.9 million visits in 2012 and accounting for 72% of visitor volume.

Well over half of US travellers (57%) have been to Canada during their lifetime, ahead of 2nd place Mexico by a considerable margin. High rates of past visitation are a challenge for Canada as US travellers may feel a lack of urgency to return.[20]

Since 2000, Canada dropped from 8th place in the UNWTO's worldwide visitation ranking to 16th place in 2012.[21] During this period, the country's dependence on domestic tourism rose from 65% to 81% of expenditures. This high reliance on domestic is precarious for domestic travellers who spend under $300 per trip, whereas international visitors spend $1459 per trip.[22] And, there is no guarantee of a stable market. Add to that the propensity for Canadians to travel outside Canada remains strong as evidenced by the travel deficit that ballooned by 736% in the last decade.[23] In 2013, outbound trips by Canadians increased 2.2% over 2012 to nearly 33 million translating into an increase to Canada's travel deficit.

> *An over-reliance on the domestic market is a dangerous and less lucrative position for the industry. International visitors are more desirable as they stay longer and spend, on average $1183 more per trip and produce larger profit margins which encourages more investment.*
>
> *Canadian Chamber of Commerce (2013)*

This situation is even more dramatic as Newfoundland residents made 86% of all person trips in the province in 2010[24] and it grew to 90% by 2011.[25]

Labrador was the primary destination for 13% of Newfoundland residents, and 60% non-residents according to the 2011 Labrador Travel survey. Of these travellers, 96% of Newfoundland residents and 91% of non-residents involved an overnight stay.[26] And while these figures are strong, the importance of having products that attract high-yield non-resident travellers for extended stays cannot be overstated.

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[19] Canadian Tourism Commission, Global Tourism Watch, US Market Summary Report, 2013

[20] Canadian Tourism Commission, Global Tourism Watch, US Market Summary Report, 2013

[21] Tourism Industry Association of Canada. (2013). *Gateway to Growth: Canadian Tourism Industry Annual Report. (pg. 11).* Retrieved from *http://tiac.travel/_Library/TIAC_Publications/2013_TIAC_Annual_Report_WEB_FINAL_EN.pdf*

[22] Canadian Tourism Commission. (2013). *Helping Tourism Businesses Prosper: 2013 - 2017 Corporate Plan Summary.* (pg.4). Retrieved from http://en-corporate.canada.travel/sites/default/files/pdf/Corporate_reports/2013-2017_corporate_plan_summary_-_june_14-13_e.pdf

[23] Canadian Chamber of Commerce. (2013, Jul). *Restoring Canadian tourism: A discussion paper.* (Pg. 5).

[24] Government of Newfoundland & Labrador. (2012, Jan.). *Resident travel survey summary report - Final - 2010.* Pg. 1. A study conducted by MarketQuest Omnifacts Research for the Department of Tourism, Culture and Recreation.

[25] Government of Newfoundland Labrador. (2012). *Tourism Vision Evaluation: Annual Report 2012.* (Pg. 3). Document provided by the NL Department of Tourism, Culture and Recreation.

[26] Government of Newfoundland & Labrador. (2012, Jan.). *Labrador travel survey Final Report 2011.* Pg. 22-23. A study conducted by MarketQuest Omnifacts Research for the Department of Tourism, Culture and Recreation.

Travellers from Ontario represented 34% of non-resident travellers reporting an overnight trip in Labrador the province's largest source market.[27] Both the USA and Maritimes represented 21% of overnight visits each, followed by 18% from other places in Canada, a small 2% from Quebec and 4% overseas.[28]

NEWFOUNDLAND & LABRADOR VISITATION AND EXPENDITURES

Newfoundland and Labrador's tourism performance was a good news bad news story in 2013 and also raised a cautionary flag. On the positive side, non-resident tourism expenditures grew to $467.4M; a 1.9% increase over 2012 levels however non-resident visitation dropped by 1.5% to 497,900 from January 1 to December 31, 2013.[29]

The largest segment of NL's non-resident travellers arrived by air. 2013 saw an increase in non-stop seat capacity offered by NL's airline partners which increased passenger levels at the seven major provincial airports. Non-resident air travel increased by 2% over 2012 levels to an estimated 367,200 visitors. Expenditures for non-resident air visitors are estimated to have reach $372.5 million, up 3.7% over 2012."[30]

Roofed accommodation occupancy statistics, a standard metric used to track travel performance, increased in 2013. TCR indicated in their Year-End Performance Report that occupancy rates on a provincial level reached 51.7%, an increase of 1.5 percentage points over 2012's 50.2%. Accommodation performance has been mixed at the regional level, with increases reported in Labrador (3.6 points) and on the Avalon Peninsula (3.2 points). "Average daily room rates were up across the board, with the provincial average daily rate up 5.7% to $128. Average daily rates increased in the Avalon region (+5%), Eastern (+3%), Central (+5%), Western (+5%) and **Labrador (+10%)."**[31] Growth in the Labrador rates are more than likely attributable to increased travel among those in the mining and energy sectors.

Cruise arrivals dropped slightly in 2013 from their record levels in 2012 but still enjoyed 64 port calls to 23 different ports with 20 different vessels bringing visitors to experience Newfoundland and Labrador through coastal access. A total of 41,376 visitors and 20,444 crew represented the second highest level of unique visits[32] achieved by the province to date.[33] Two shifts in 2013 are to be noted. The first was the trend towards smaller ships; this fits with the scale of the destination, particularly in Labrador. The second was an increase in homeporting[34] out of St. John's. Finally the North American Emissions Control Area Legislation (ECA) was reported to have an impact on the cruise industry.[35] This is a new policy that requires vessels sailing within North American waters to have higher emission standards than if these same vessels were sailing in waters outside North America. Cruise lines are therefore avoiding NA waters

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[27] Government of Newfoundland and Labrador. (2011). *2011 Exit Survey - Profile of Non-residents Visiting the Labrador Region.* (Pg. 3). Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit_Survey_Visitors_to_Labrador_Region.pdf

[28] Ibid. Pg. 4.

[29] Government of Newfoundland Labrador (2014, May). *Backgrounder Year-End Provincial Tourism Performance 2013.* Pg. 21. A document provided by the Department of Tourism, Culture and Recreation.

[30] Ibid. pg. 2, paragraph 2.

[31] Ibid, pg. 3. Note: Occupancy rate: This is calculated by the total number of rooms or units sold divided by the total number of rooms or units available during the reporting period. It represents the utilization rate of the sample reporting at time of publication. Occupancy levels are subject to revision pending further reporting by the province's accommodation operators.

[32] Ibid. pg. 2, paragraph 6. Note: Unique cruise visitors is Department of Tourism, Culture and Recreation estimate, based on an itinerary review, of cruise visitation counting passengers only once regardless of the number of port calls. This differs from Cruise Newfoundland estimates of passenger visits (discussed later) whereby passengers are counted at every port call

[33] Ibid. pg. 2 and 3.

34 Homeport (homeporting) - The port in which a vessel is registered or permanently based. 2. The port from which a merchant vessel primarily operates, regardless of its registry. To base (a ship) permanently in a given port. The American Heritage® Dictionary of the English Language (2009). Fourth Edition. Published by Houghton Mifflin Company.

[35] Government of Newfoundland Labrador (2014, May). *Backgrounder Year-End Provincial Tourism Performance 2013.* Pg. 2. A document provided by the Department of Tourism, Culture and Recreation.

if their vessels don't comply with the new standards. This situation will go away as other world jurisdictions adopt the new standards in the very near future.

Decreases were reported by Marine Atlantic between Newfoundland and Nova Scotia (down 6.9% over 2012), the number of passenger related vehicles decreased (down 6.2%). While 1,657 crossings were recorded at Port Aux Basques and North Sydney, this is 130 less than 2012 representing -5.3% decrease. Fewer crossings were due in part to damage sustained by the *MV Blue Puttees* in August, which resulted in the cancellation of the service to Argentia for several weeks. As well, mechanical issues and extreme weather conditions caused additional service cancellations." [36]

UNPRECEDENTED CHOICE

Travellers will continue to have unprecedented choice in their travel options domestically and internationally. A coordinated approach between all layers of government and industry at the national, provincial, regional and county level is essential to optimizing the limited resources to increase the volume and yield from visitors. Collaborating to compete is the new order, focusing on the visitor experience, their journey and understanding, and how your business contributes to today's opportunity.

Gone are the days of thinking only about your business or your community. This supply-side thinking no longer serves the industry well as travellers now have the choice of any place in the world within a few words or the click of a mouse. This means business, industry and government must collaborate in new and innovate ways that respond to the changes. Known as the *Shared Economy*, the pooling of human and physical assets is becoming the new norm, along with the shared creation, production, distribution, trade and consumption of goods and services by different people and organizations.

> *Canada must develop niche products and services tailor-made to match the unique characteristics of its diverse regions.*
>
> *Deloitte's Destination Canada: Are We Doing Enough (2007)*

Ranked as the No. 1 country for overall reputation in the world,[37] the FutureBrand's Country Brand Index also rated Canada as the #2 country brand in 2012, and #1 in 2010 and 2011[38] yet it's not translating into the visitation numbers industry would like.

In NL, the $94 million invested in provincial marketing and the *Find Yourself Campaign* has garnered over 183+ awards since 2006 and created strong brand awareness of the province.[39] Yet attracting new visitation remains a challenge for Canada and NL alike. Countries like the USA for example are investing $20M of their $100M Brand USA funding to lure Canadians south of the border. At the same time the Canadian Tourism Commission saw its marketing budget cut by 20% to $58.8M and in 2013 NL saw a 30% reduction to their tourism budget.

Finally, the talent gap continues to be reported as a major challenge facing the tourism industry in Newfoundland[40] and across Canada.[41] [42] The demand increases, yet the availability of skilled labour decreases, so the region of Newfoundland and Labrador will struggle in realizing their full potential.

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[36] Ibid. pg. 2, paragraph 4.

[37] Canadian Tourism Commission. (2013, June). Press release. http://en-corporate.canada.travel/content/news_release/reptrak-report-reputation-institute-canada-brand-number-one

[38] Canadian Tourism Commission. (2012). Corporate awards. http://en-corporate.canada.travel/about-ctc/our-awards

[39] CBC News. (2013). http://www.cbc.ca/news/canada/newfoundland-labrador/award-winning-n-l-tourism-campaign-hit-by-4m-cut-1.1300762

[40] Canadian Tourism Human Resource Council. (2012, Mar.). *Attracting and Retaining Tourism Talent: Current Labour Issues and Future Challenges.* A power point presentation for the HNL Board of Directors Meeting March 23, 2012.

[41] Deloitte LLP. (2008). *Tourism amid Turmoil: How Canadian companies can compete. (*p. 12). A research report prepared for TIAC. Retrieved from http://tiac.travel/_Library/documents/deloitte_tourism_amid_turmoil.pdf

Coping strategies to avoid the negative impacts from labour realities will include reduced hours, shortened operating seasons, partial room operations for hotels, a potential decrease or inconsistent service quality, and the ability to compete against higher paying fields such as the resource industries. Newfoundland and Labrador is internationally renowned for its people and hospitality and will have to innovate wisely, consider new staffing business models, invest in training immigrants and consider retirees as part of a refocused investment to ensure the lived experience by visitors matches the perception that is in marketplace and perpetuated by the provincial marketing campaigns.

Depending on the source (the CTC, TIAC, Canadian Chamber of Commerce, TCR or CTHRC), some of the key challenges facing the tourism industry include:

- Losing global competitiveness;
- High cost of travel, air travel in particular, and the high hassle factor;
- Insufficient investment in marketing, being out spent by many countries;
- Attracting investment and investing in new and refreshed product development;
- Labour shortages;
- Growing travel deficit; and
- Transportation.

Yet despite these challenges, tourism is described as a solid, consistently performing industry that, with the right government support, investment, collaborative action and industry engagement, can improve its outcomes going forward and reclaim market share.[43]

To be competitive, Labrador must focus its investments in product and market development in ways that increase the attractiveness for non-resident Canadians and international visitors, while maintaining a position of strength for Newfoundlanders and Labradoreans.

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[42] Government of Canada (2012). *Canada's federal tourism strategy: Welcoming the world.* (p. 20). Downloaded from http://www.ic.gc.ca/eic/site/034.nsf/vwapj/Canadas_Federal_Tourism_Strategy-eng.pdf/$file/Canadas_Federal_Tourism_Strategy-eng.pdf

[43] Tourism Industry Association of Canada. (2013, Fall). *Gateway to growth: Tourism competitive benchmarking study.* (p. 11 & 24). Retrieved from http://tiac.travel/_Library/TIAC_Publications/2013_Domestic_Tourism_Benchmarking_WEB_FINAL_EN.pdf

4.2 Data Insights

ASSESSING LABRADOR'S APPEAL

There are five dimensions to the TDVAA. It's important to note that the categorization is not absolute; rather it is based on a review of the data, discussion with Destination Labrador and conclusions reached. Each dimension first presents the summary statement, this is followed by data tables, key findings about the facts, and finally the implications and considerations. Together this information is aggregated resulting in the key findings and recommendations in Chapter 3.

Table 5: High Level Summary of the Key Assessment Dimensions

1. Reports, Plans and Studies Dimension			Yes	Almost	No
Existing Info	Existing information	EI1 Depth of reports, plans, studies	X		
Existing Info	Projects in the pipeline	EI1 Tourism demand generating PIP's	X		
2. Visitor Dimensions			**Yes**	**Almost**	**No**
Visitor Profile	Demographic research	VP1 Depth of demographic info on visitors	X		
Visitor Profile	Psychographic research	VP2 Depth of psychographic info on visitors		X	
Visitor Profile	Satisfaction & exist surveys	VP3 Produces satisfaction & exit surveys	X		
Customer Engagement	Website and social media links	CE1 Municipal websites with essential info			X
Customer Engagement	Website and social media links	CE2 Destination websites with essential info	X		
Customer Engagement	Website and social media links	CE3 Tourism Operators with essential info		X	
Customer Engagement	TripAdvisor	CE4 Municipalities with TripAdvisor accounts			X
Customer Engagement	TripAdvisor	CE5 Destination with TripAdvisor accounts			X
Customer Engagement	TripAdvisor	CE6 Tourism Operators with TripAdvisor accounts			X
Customer Engagement	Facebook	CE7 Municipalities with Facebook Accounts			X
Customer Engagement	Facebook	CE8 Destination with Facebook Accounts			X
Customer Engagement	Facebook	CE9 Tourism Operators with Facebook Accounts			X

3. Product and Market Dimensions				Yes	Almost	No
Assets & Attributes			***Infrastructure Based Companies***			
	Transportation	IB1.1	Variety of ground transportation options			X
		IB1.2	Travel options to and within the region		X	
		IB1.3	Reliable, frequent visitor signage		X	
		IB1.4	Variety of amenities for watercraft travellers		X	
	Visitor Info Centres	IB2	Variety of visitor services		X	
	Accommodations	IB3.1	Variety of quality levels & price points		X	
		IB3.2	Has branded or 'flag' properties			X
	Culture - Heritage	IB4	Culture and heritage assets at varying price		X	
	Nature Based	IB5	Nature based assets at varying price points	X		
	Trails and Routes	IB6.1	Driving routes through the region	X		
		IB6.2	Activity based trails (hiking, snowmobile)	X		
		IB6.3	Variety of walking trails	X		
	Man Made	IB.7	Man-made attractions at various price points			X
	Shopping/Retail	IB.8	Shopping and retail at various price points		X	
	Culinary, Food and Beverage	IB9.1	Restaurants with variety of options & price points			X
		IB9.2	Responds to F & B needs of various travellers			X
		IB9.3	Offers culinary themed establishments that purposefully attract visitors.			X
	Conference, Convention, Trade Show	IB10	Offers conference, convention, and trade show space to serve as a primary draw for markets	X		
			Activity-Based Tourism Assets & Outfitters			
		AB1	Offers a range of activities to engage visitors	X		
		AB2	Flexibility/choice for length, interaction, price		X	
		AB3	Tour operators that package & sell domestically	X		
		AB4	Tour operators that package & sell internationally	X		
			People/Program Based Companies			
		PB1	Has a range of experiential program providers			X
		PB2	Hosts a number of festivals & special events	X		
		PB3	Festivals and special events that are offered on a regular basis	X		
			Demand Generators			
		DG1	Primary demand generators	X		
		DG2	Secondary demand generators	X		

4. Sustainability: Growing Tourism into the Future Dimensions				Yes	Almost	No
Resource Base	Human Resources	HR1	Sufficient labour pool for current/future visitation			X
		HR2	Region promoting tourism as a viable career option			X
		HR3	Evidence of strategies addressing labour constraints			X
		HR4	Evidence of training and business development in last 5 years	X		
		HR5	Evidence of tourism business succession planning			X
	Sales & Marketing	SM1	Tourism businesses selling through multiple channels		X	
		SM2	Individual operator sales extended through regional or provincial online booking engines			X
		SM3	Region contributes to province with iconic and primary demand generators	X		
		SM4	Regions participates in activities to drive business to operators	X		
		SM5	Region has tour operators selling domestically	X		
		SM6	Region has tour operators selling internationally	X		
		SM7	Market demand for range of tourism offers		X	
	Environmental & Social Practices	ESP1	Evidence of environmentally responsible practices relative to tourism.		X	
		ESP2	Human use impact monitoring			X
		ESP3	Environmental impact monitoring		X	
		ESP4	Community engagement in events that attract visitors	X		
	Strategic Planning & Investment	SPI1	Tourism is an objective in long-term plans/documents	X		
		SPI2	Current strategy to guide investment & product development		X	
		SPI3	Current marketing plan to guide investment & promotional activities	X		
		SPI4	In past 5-years, capital has been invested in infrastructure renewal/expansion	X		
		SPI5	In past 5-years, capital has been invested in product & experience development	X		
		SPI6	The majority of tourism businesses (private & not-for-profit) can survive without government funding			X

5. Measures of Success Dimensions				Yes	Almost	No
Key Performance Indicators	Measures of Success	KPI1	Commercial accommodations on par or above provincial average.	X		
		KPI2	Offers year-round tourism opportunities.		X	
		KPI3	Commercial occupancy spread through the year.	X		

4.2.1 Reports, Plans, and Studies Dimension

1. Reports, Plans and Studies Dimension: Existing information available to industry, plus projects in the pipeline at the discussion stage or submitted for approval or funding.		
Consolidate Existing Information	EI1 Existing information E12 Projects in the pipeline	Identifies the documents, plans, studies, and projects that impact tourism (secondary data).
Data Collectors	TCR, HNL, NG and support from IBRD/ACOA and others	

EI1 The destination has a depth of reports, plans and studies. [YES]

EI2 The destination has projects in the pipeline that will increase demand for tourism. [YES]

Labrador has invested in significant reports and studies related to developing and managing tourism. This is complemented by the large array of provincial research documents and reports that contribute to informing decision-making in Labrador and for Destination Labrador.

While each document offers any number of specific recommendations impacting the regions tourism prospects, for the purpose of this project a regional lens was applied to the document review.

This study was informed by the Department of Tourism, Culture and Recreation's (TCR) Tourism Destination Management System (TDMS) and the Restaurant Association of Newfoundland and Labrador's (RANL) E-Dining databases plus a significant number of reports, plans and studies provided by TCR, HNL, DL, IBRD, ACOA, the NG, industry stakeholders and the contractor. In total,193 documents were considered (Appendix 3) plus 26 Nunatsiavut stakeholder interviews (Appendix 4) conducted as part of the Nunatsiavut Government 2014 – 2020 Tourism Strategy Refresh project that was done in parallel with the Labrador TDVAA:

- 5 International documents reviewed
- 28 National documents reviewed
- 69 Provincial documents reviewed
- 91 Labrador region documents reviewed which included:
  - *30 Destination Labrador*
  - *20 Community, Businesses and Projects in the Pipeline*
  - *41 Nunatsiavut Region*

The scope of the documents reviewed included:

- Business plans and special project plans
- Strategic planning documents

- Tourism research such as exit studies, performance metrics, tourism indicators, operating statistics, visitor statistics, air capacity, hotel occupancy, and rate insights
- Customer and market profiles (resident, non-resident, national)
- Labour market information
- Activity profiles (e.g. hiking, skiing, snowmobiling, fishing, hunting etc.)
- Resource inventories
- Trends
- Site plans and architectural drawings
- Conference Summary Notes / Outcomes

As well, there were multiple ferry, airline and cruise schedules reviewed plus data tables from TDMS that are not catalogued in Appendix 3 but were part of the materials used and reviewed.

Projects in the Pipeline are defined as major projects that are in the concept or development stage, application for funding stage, or approval stage that will bring a significant provincial, regional or community contribution to tourism. Requests were made for any projects within the past five years (2008-2013). Table 6 lists the 11 projects identified as offering the greatest tourism potential for Labrador.

Table 6: Projects in the Pipeline Offering the Greatest Tourism Potential

South Coast	Red Bay National Historic Site visitor experience development relative to their new UNESCO World Heritage status
Labrador	Paving of Trans Labrador Highway (TLH) from Labrador to Goose Bay Enhanced access from Goose Bay to Cartwright Mealy Mountains Application for National Park Designation
North Coast	Nain Torngâsok Cultural Centre, $16M investment Hopedale Moravian Mission Complex, $2.5M investment Hebron continued restoration and improved interpretation and reconstruction of Hudson Bay Houses as visitor accommodations Rigolet Archaeology project with the construction of a Sod House near the 5 km extension of the Rigolet boardwalk. Nain - Old Town Development Makkovik 5.35 km Walking Trail, $480K
North-South Coast	South & North Coast Apollo and Northern Ranger Ferry replacement RFP

Other projects in process include the continued expansion of Base Camp on the North Coast, extending the Labrador Pioneer Footpath, and preliminary discussions about how to capture the amazing trail experiences in the Bowdoin Canyon.

KEY FINDINGS

There are several major projects in the pipeline that will have long-term developmental impacts for Labrador and particularly, the north and south coast (Table 2); some of which will add new product for national and international visitors. For example:

- The Trans-Labrador Highway project will open the 'Big Land' with over 1,000 km of paved road enhancing access from northeast Quebec from Labrador City to Happy Valley/Goose Bay and generating increased traffic for the South Coast;
- Torngâsok Cultural Centre in Nain will become Canada's only purpose built centre that celebrates the history and stories of the Labrador Inuit and the first major new attraction in Nunatsiavut since securing their independent government status in 2005;
- Red Bay National Historic Site (NHS) received UNESCO World Heritage Site designation in 2013. They are currently engaged in a Visitor Experience Master planning activity to enhance the product offer. This designation also creates a unique

opportunity to create a powerful visitor journey with a trilogy of UNESCO World Heritage Sites, Gros Morne National Park (GMNP), L'Anse aux Meadows NHS and Red Bay NHS. This will be the only place in Canada where guests can experience all three sites on a single visitor journey. The challenge will be that GMNP and L'Anse aux Meadows NHS have historically enjoyed higher visitor volumes and a more developed tourism experience than the South Coast of Labrador can offer, so visitor expectation, quality and standards will need to be aligned over time;

- The Mealy Mountains is in its final stages of stakeholder negotiations for National Park designation. Official status is anticipated to be secured in 2014 and will impact the communities of Cartwright and Rigolet most significantly at the onset. These are also the towns where new Parks Canada staff will be hired to work in the park; and
- An array of community-based projects have been initiated in Nunatsiavut as the NG take a proactive and balanced approach to the tourism development in Nain, Rigolet, Postville, Hopedale, Makkovik, Hebron and Base Camp at the Torngat Mountains National Park.

Implications/Considerations

- The Advisory Committee, IBRD, ACOA, DL, TN/NG and the Province in consultation with project proponents should examine the Projects in the Pipeline for their long-term potential (10-years) and to forecast the potential and strategic investments for each project to ensure they generate greatest return on investment (ROI) for tourism businesses and communities, and a memorable return on emotion (ROE) for visitors; and
- As Labrador is in its infancy for tourism development relative to other regions of NL, the emphasis is currently on infrastructure. It is important to prioritize investments to make sure from the onset that the activities and people/program based opportunities that will generate the higher revenues and guest experience is an integral part of all development and funding proposals.

4.2.2 Visitor Dimension

2. Visitor Dimensions: A tourism destination with a high appraisal can demonstrate their investment in understanding the traveller.			
The Visitor Profile	VP1 Demographic research VP2 Psychographic research VP3 Satisfaction & exist surveys	Identifies the research available to inform decision-making based on an understanding of the traveller.	Data Collectors: TCR, HNL, DL
Customer Online Engagement	CE1 Operator websites CE2 TripAdvisor CE3 Facebook	Assesses if the destination, cities and businesses have a TripAdvisor and/or Facebook account and the degree of responsiveness to traveller posts.	Data Collectors: Data collection team (DCT)

VP1 The destination has a depth of demographic information about visitors. [YES]

VP2 The destination has a depth of psychographic information on traveller motivations. [ALMOST]

VP3 The destination produces satisfaction and exit surveys to gather insights on visitors' travel experiences. [YES]

The province gathers a wide range of ***demographic information*** on a number of variables such as visitation numbers, roofed accommodations, camping, airport passenger movement, room night sales, non-resident demographics per-party spend, etc. This information leads from a provincial perspective and where the sample size is sufficient can allow a regional segmentation to be extrapolated. Additionally, the depth of research on non-resident travellers is substantially higher than resident travellers that represent 10% of the travel population vs. 90% resident traveller (Table 7).

Table 7: 2011 Resident and Non-Resident Visitation and Spend in NL

2011 Figures	Resident Travel	Non-Resident Travel	Total
Person Trips	4,072,000	459,100	4,531,100
Percent of Visitation	90%	10%	
Spend	$575.1 M	$424.6 M	1.004B
Percent of Tourism Spending	58%	42%	
Per Person Yield	$141.23	$923.55	

Source: Tourism Vision Evaluation Annual Report 2012[44], p. 3.

A research presentation of the Canadian Travel Market based on the new TCR Non-resident Travel Attitudes and Motivations study (Nov 2013) revealed characteristics of the Canadian travel market:

- 82% of vacation visitors to NL in May to October are Canadians[45];
- 71% had never visited NL[46];
- 50% have a minimum of a university degree and 29% have incomes greater than $100,000 (which often is associated with ability to pay);
- 47% are looking for travel bargains, 53% make travel plans in advance and 24% take several short vacations only (which is challenging for Labrador given the remoteness and limitations for integrated bookings/reservations);
- 27% take one or two long vacations, 32% vacation year-round;
- 15% prefer an inclusive package compared to 47% who like to set their own itinerary; and
- Key associations with NL as a vacation destination are: ocean adventures, ocean/coastlines, whale-watching, icebergs, local culture and Gros Morne – all of which are aligned with Labrador's potential.

There is limited ***psychographic information*** specifically on visitors to Labrador to create a visitor profile for operators in Labrador. The findings from the Non-resident Travel Attitudes and Motivations study may help fill part of the informational gap operators are seeking. The study was not yet released at the time of writing this report.

Exit surveys and key reports are published on a regular schedule (Appendix 3); the frequency, however, has been impacted by budget cutbacks. A sample of the range of reports include:

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[44] Note: "Due to the new methodology, non-resident visitor and spending estimates for 2011 and onward are not directly comparable to estimates in previous years which were based on 2003/2004 Exit Survey results.

[45] Government of Newfoundland & Labrador (2014, February). *Canadian travel market summary.* A presentation at the Hospitality Newfoundland and Labrador Conference, slide 2.

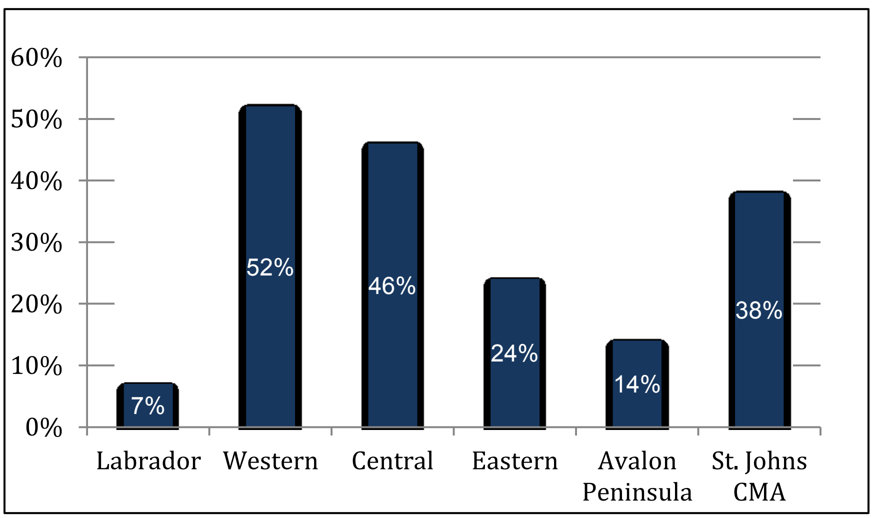
[46] Ibid. slide 9

- TCR published research on information about visitor satisfaction levels can be found in several reports;
- 2011 Exit Survey - Profile of Non-residents Visiting Labrador (Economic Zones 1-5);
- Multiple 2011 Exit Surveys - Profile of Non-residents related to: archeology sites, craft/gift shops, pleasure walking in around communities, geological tours/fossil observation, trail hikers, Quebec and US visitors, historic sites and Western region visitors;
- 2013 (Jan) Destination Labrador – FAM Tour Summary;
- 2011 Labrador Travel Survey Final Report;
- 2012 Tourism Vision Annual Report;
- 2009 Red Bay NHS Visitor Information Program; and
- 2014 Newfoundland and Labrador Tourism Performance 2013.

KEY FINDINGS

In terms of tourism performance and perhaps popularity, Labrador has the lowest resident visitation with 7% of travellers having been to the region. Twenty-four percent of visitors have visited the Eastern Region, 14% the Avalon Peninsula, 38% St. Johns, 46% the Central region and 52% to the Western Region (Figure 5).[47]

Figure 5: Percent of Visitors to Regions in NL



- Given the strong Parks Canada presence in this region for major attractions, the use of the CTC Explorer Quotient (EQ) research is providing enhanced customer profiling information for the major attractions and companies, as such NG Solutions has followed suit in using this research to inform their product, market and promotional activities;
- Understanding the travel attitudes and motivations of visitors between Labrador and the Western Region and having customer profiles relevant to Labrador was identified as a need; and
- There is a strong interest in attracting the international traveller to Labrador, particularly

[47] Government of Newfoundland & Labrador. (2012, Jan.). *Resident travel survey summary report - Final - 2010.* A study by MarketQuest Omnifacts Research for the Department of Tourism, Culture and Recreation. pg. 23.

for the North and South Coastal communities, which given the per person yield will contribute positively to the provincial spending goals.

IMPLICATIONS/CONSIDERATIONS

- While there is a dearth of research information in multiple documents, operators need consolidated visitor profiles, relevant to their region/sub-region to more specifically target, develop and market their tourism products, services and experiences;
- Operators confirmed that they need to better understand their customers;
- The popularity of the Western region of NL should be a primary focus for partnership product development and driving visitation up the Viking Trail and through to Red Bay NHS and UNESCO WHS and on to Battle Harbour National Historic District for long-haul visitors; and
- Labrador's potential to attract non-resident visitation is strong given, for many, it represents a once-in-a-lifetime destination.

Customer Engagement

Appreciably, the number of places where tourism destinations, municipalities and businesses can provide information to travellers and create online engagement is endless. To examine if there is a basic level of online customer engagement with travellers, this study looked at:

- Municipal and operator websites
- tripadvisor
- LIKE US ON facebook

This aspect of the TDVAA examined the degree to which the businesses, municipalities and regional destination marketing sites are present in three key areas: Website, TripAdvisor and Facebook. Specifically, from a visitor lens the research looked at if these organizations were easily found online and the level of engagement and conversation occurring with current, past or potential visitors.

CE1 The destination has municipal websites that provide essential visitor information. [NO]
CE2 The destination has destination websites that provide essential visitor information. [YES]
CE3 The destination has tourism business websites that provide essential visitor information. [ALMOST]
CE4 Municipalities have TripAdvisor accounts. [NO].
CE5 Destination organizations have TripAdvisor account. [NO]
CE6 Tourism operators have TripAdvisor accounts. [NO]
CE7 The municipalities have Facebook accounts. [NO].
CE8 The destination organizations have Facebook accounts. [NO]
CE9 Tourism operators have Facebook accounts. [NO]

Table 8: Municipal & Destination Website Summary

Website Summary	Municipalities		Destinations	
	Number in Labrador	% with Websites	Number in Labrador	% of total with Websites
Total number of towns/cities in the region	23	88%	-	-
Total number of unincorporated towns in the region	3	12%	-	-
Total number of websites in region (incorporated and unincorporated) with a basic tourism section	8	31%	-	-
Total number of destination websites	-	-	5	100%
Of those 8 municipal and 5 regional destinations with websites that have tourism information				
Have visitor testimonials posted on their website	0	-	2	40%
Post photos of visitors engaged in the activity/experience	0	-	4	80%
Post photos of the location or infrastructure	6	75%	5	100%
Post tourism related videos of visitors engaged in the experience	0	-	2	40%
Post videos of the location or infrastructure	0	-	2	40%
Have a tourism booking call to action on websites	6	75%	5	100%
Have ‘how to get here’ visitor information on website	7	88%	5	100%
Accept phone/email reservations for tourism booking	5	63%	4	80%
Accept online reservations for tourism bookings	0	-	0	-
Sign up for a tourism e-newsletter sign up option	0	-	1	20%
Have a contact page for the travel trade	0	-	1	20%
Have a destination/city/town tourism blog	0	-	2	40%
Have a link referring guests to their TripAdvisor Account	0	-	0	-

Table 9: Tourism Operators Online Summary Activity

Total Assets by Sector	Number of Assets	Percentage With websites	Percentage with Trip Advisor	Percentage with Facebook
RV & Campgrounds	7	43%	14%	0%
Roofed Accommodations	46	50%	35%	26%
Culture and Heritage Based Assets	22	68%	14%	23%
Nature Based Assets	14	29%	7%	0%
Trails and Routes	40	83%	0%	8%
Man-Made Attractions	6	83%	0%	33%
Activity Based Business	12	75%	8%	42%
Outfitter Businesses	42	67%	2%	12%
Program Based Assets	5	20%	20%	40%
Festivals and Events	50	58%	2%	28%

Note: 42 Outfitting businesses were identified as active and operational; some with multiple sites to take their guests. The number of sites for these 42 businesses was 55. An additional 25 companies that appeared in TDMS were removed from this tally as the data collection team could not find evidence of any market-ready saleable visitor experiences and/or they had gone out of business.

Table 10: Tourism Operator's Select Website Information

F. Website Information																
Business Sector	Number of Businesses	Website (1/0)	Visitor Testimonials	Photos of visitors engaged	Photos of location/infrastructure	Post photos of visitors engaged in experiences	Post videos of the location or infrastructure	Call to action on the website	How to get here info/maps/ etc.	Email or phone reservations	Online reservations	Accept credit card payment	Newsletter	Contact page for travel trade	Have a company blog	Have a link to their Trip Advisor account
RV & Campgrounds	7	3	0	0	0	0	0	2	3	3	2	4	0	0	0	1
Roofed Accommodations	46	24	8	4	17	4	2	22	14	24	3	33	0	0	0	4
Culture and Heritage Based Assets	22	15	1	1	10	0	1	6	3	12	1	4	0	0	1	1
Nature Based Assets	14	4	0	1	2	0	0	0	2	2	1	1	0	0	0	0
Trails and Routes	40	33	2	7	17	7	1	25	15	8	4	5	0	0	0	0
Man-Made Attractions	6	5	0	2	2	0	0	4	3	4	0	2	1	0	0	0
Activity Based Businesses	12	9	2	7	7	5	2	7	4	6	2	6	1	0	0	1
Outfitters	42	28	12	26	27	12	5	23	22	27	1	14	2	0	1	1
Program Based Businesses	5	1	0	1	1	0	0	1	0	1	1	3	0	0	0	1
Festivals and Events	50	29	3	16	16	15	5	4	10	2	5	7	3	25	0	0
Totals	244	151	28	65	99	43	16	144	76	89	20	79	7	25	2	9
Percentage*		62%	19%	43%	66%	28%	11 %	95%	31 %	59 %	13 %	52 %	5 %	17 %	1 %	6 %
*Of those with a website																

Table 11: Municipal & Destination TripAdvisor Summary

% are of those with a TripAdvisor Account	Municipal		Destination	
	Number	% of total	Number	% of total
# with a TripAdvisor Account	0	-	1	20%
# of Hotels/Accommodations listed	-	-	0	-
# Restaurants	-	-	0	-
# Attractions/Things to Do	-	-	0	-
Never respond with a comment to guests (1/0)	-	-	0	-
Never respond with a comment to guests (1/0)	-	-	0	-
Respond to a guest reviews <50% of the time (1/0)	-	-	0	-
Respond to a guest reviews >50% of the time (1/0)	-	-	0	-

Table 12: Municipal & Destination Facebook Summary

% are of those with a Facebook Account	Municipal		Destination	
	Number	% of total	Number	% of total
# with a Facebook Account	4	15%	3	60%
# of likes	19 - 561	-	131 - 764	-
#of people talking	0 - 64	-	1 - 14	-
# Visitors were here	0 - 137	-	0	-
Link to their trip advisor account	0	-	0	-
Link to google map	0	-	0	-
Have a link referring guests to their YouTube account	0	-	0	-
Have direct links to companies sales pages	0	-	2	67%
Have a booking engine for businesses	0	-	0	-
Accept credit card payments	0	-	0	-

Table 13: Tourism Operator's TripAdvisor Presence

G. Trip Advisor										
Business Sector	Number of Businesses	Account (1/0)	Number of reviews	Number of visitor photos	Professional Photos (1/0)	Range of Ratings out of 5	Zero comments	# comments in top 10 reviews	Responds <50 of the time (1-5 out of 10)	Have a link referring guests to their Facebook page
RV & Campgrounds	7	1	1	0	0	1	1	0	1	0
Roofed Accommodations	46	18	164	67	4	1-5	20	0	19	2
Culture and Heritage Based Assets	22	3	31	29	0	4.5-5	3	0	3	0
Nature Based Assets	14	1	2	11	0	5	1	0	1	0
Trails and Routes	40	0	0	0	0	0	0	0	0	0
Man-Made Attractions	6	0	0	0	0	0	0	0	0	0
Activity Based Businesses	12	1	1	40	1	0	1	0	1	1
Outfitters	42	1	1	0	1	5	1	1	0	1
Program Based Businesses	5	1	0	36	0	0	1	0	1	0
Festivals and Events	50	1	17	39	0	5	1	0	0	0
Totals	239	27	216	507	6	1-5	29	1	26	4
Percentage *		11%						4%		15%
* Of those with a TripAdvisor account										

Table 14: Tourism Operator's Facebook Presence

H. Business Facebook													
Business Sector	Number of Businesses	Facebook (y/n)	Number of Likes	# of people talking	Visitors were here	# posts in last 14 days	Link to their Trip Advisor Account	Link to Google map	Link to Events	Link to Special offers	Post photos	Post videos	Offer some type of engaging contest
RV & Campgrounds	7	0	0	0	0	0	0	0	0	0	0	0	0
Roofed Accommodations	46	12	1394	145	1	16	0	3	1	1	9	2	0
Culture and Heritage Based Assets	22	5	2216	10	102	3	0	1	3	0	5	0	0
Nature Based Assets	14	0	0	0	0	0	0	0	0	0	0	0	0
Trails and Routes	40	3	603	46	0	6	0	0	2	0	2	0	0
Man-Made Attractions	6	2	539	31	0	12	0	0	1	0	2	0	0
Activity Based Businesses	12	5	1104	43	235	11	0	1	3	0	5	1	0
Outfitters	42	5	1420	64	3	8	1	1	0	0	6	3	0
Program Based Businesses	5	2	209	0	0	7	0	0	0	0	2	0	0
Festivals and Events	50	14	5381	305	710	16	0	4	9	0	13	4	1
Totals	264	48	12866	644	1051	79	1	10	19	1	44	10	1
Percentage *		18%					2%	21%	40%	2%	92%	21%	2%
* Of those with a Facebook account													

Key Findings

- There are Internet broadband issues along the south coast where Bell Aliant will not sell an account to businesses making it a real challenge for businesses in these communities;
- There are five key destination websites in Labrador that, to varying degrees, provides a centralized focus for visitors to secure information (Table 8). This includes: Destination Labrador (Regional DMO), Tourism Nunatsiavut (official tourism site of the NG Government) two regional tourism destination clusters for the Labrador Costal Drive and Labrador West, plus one immigration focused site with tourism information (Southern Labrador). Of these destinations, only one (www.tourismnunatsiavut.com) has a TripAdvisor account;
- 31% of the 26 municipalities (23 incorporated, 3 unincorporated) in the region have a website with a tourism landing page that offers limited visitor information. Of those, Rigolet provides the best example of a smaller community and how to portray their offer and the key people in the community who offer visitor programs and services;
- Few communities are engaging visitors in conversations about their experiences even though guests are posting comments about their visits;
- Most categories of tourism businesses are represented online with websites (Table 9). The strongest categories are trails and routes and man-made attractions both at 83% business presence, followed by activity based businesses (75%), culture and heritage based assets (68%), outfitters (67%), festivals and events at 58%. Sadly, roofed accommodations are only at 50% and RV/campgrounds at 43%, which given the remote nature of Labrador is an essential element of the travellers booking need and requirement;
- Conversely, tourism businesses with Facebook presence is low with outfitters at 12% on the lower end to activity based businesses at 42% on the upper end, with roofed accommodations and cultural/heritage assets in the middle (26% and 23% respectively). Additionally, there remains a lack of understanding between the use of personal Facebook websites and business sites relative to driving attention to a business;
- Operator's TripAdvisor presence is ever weaker ranging from no to less than 10% presence with trails, man-made attractions, outfitters, activity based businesses, festivals and events, and nature based assets to the leading category accommodations at 35%. Engagement and creating conversations with guests by responding to posts varies widely, but overall, most operators are not actively conversing with their guests on TripAdvisor which limits their ability to personalize their comments and relationship with their guests;
- There is strong tourism infrastructure imagery on websites, however, most are weak on including visitors engaged in the experience they are selling and few use video on their websites, Facebook and TripAdvisor profiles;
- The call to action on the home page or website to make a booking, reservation, or close the same in a timely fashion is extremely weak, with the exception of fixed roof accommodators (48%) and trails (63%) and all of the destination websites (100%);
- Operators are very weak in creating the digital connections between multiple social media platforms which could quickly and easily be corrected through hyperlinks and connecting their website, Facebook site, TripAdvisor profiles and any others they may use (YouTube, Pinterest, etc.); and
- TDMS poses challenges relative to the accuracy of the information in their data base for a number of reasons: (1) Businesses that are out of business remain online, (2) There are a number of businesses that are private and while attracting guests which are tracked as tourists, do not sell to the general public (e.g. certain outfitters and hotels for resource workers only), (3) DL could assist with quality control of the entries, in collaboration with businesses, but the current TDMS business model doesn't allow RDMOs access to update entries, and (4) An annual call to action to update data, in 2014, limits the ability for the information available to travellers to be dynamic and

current.

Implications/Considerations

- The broadband access issues along the southern coast must be a priority as basic communication infrastructure development for communities with tourism as a benefactor is a necessity;
- Tourism businesses are not leveraging readily available and low / no cost online tools in order to grow their business. This translates into making visitors work hard to find the information they are looking for and will without doubt, impact their decisions to travel to the Labrador and, or to tourism businesses in the region;
- For those businesses that are using online tools like TripAdvisor and Facebook most are missing the opportunity to have conversations with their guests (i.e. by responding to comments and complaints), which in turn has the potential to negatively influence the actions and behaviour of future potential guests;
- The regional destination websites serve the visitor better than the municipal sites for travellers looking to understand the destination. The limitation of a couple of sites however, is that they receive project-based funding so may not be sustainable. Maintaining too many sites with limited skills and manpower needs to be revisited, therefore rather than enhancing the number of municipal sites communities should be encouraged to have an informative tourism page with links to the major tourism promoters including www.newfoundlandlabradorlcom at a minimum as well as links to the tourism businesses in the town and surrounding areas;
- A concentrated effort to get all accommodations online is vital;
- Content is a challenge for businesses with limited human resource capacity and skills; lots of effort has gone into creating historical content, but not enough related to visitor information and driving the sale;
- Some operators struggle with understanding the value of websites, TripAdvisor, Facebook and other online distributions channels to enhance their reputation, meet expectations of travellers and to drive and close the sale. There is a need for BASIC training still in the region at the relevance level and to ensure all businesses have a basic, yet quality online presence that is sustainable and meets expectations. The more remote you are, the more visitors need detailed information to feel confident in their travel planning and the companies they choose to book with. A small, easy to read, simple toolkit presenting basic online guidance, complete with visuals and a helpline would go a long way in the short-term to improving Labrador’s collective web presence; and
- When the province updates TDMS they should look at broadening their input questions and filters so businesses in the system who purely for licensing purposes – and are not selling to the general public – are not listed on the consumer website.

4.2.3 Product-Market Dimension

3. Product and Market Dimensions: Determines the depth and breadth of tourism products, services and experiences available at various price points for different markets.			
Assets & Attributes	Infrastructure Activity-Based Tourism Businesses Program based Tourism Businesses Demand Generators / Visitation Motivators	Identifies the core tourism assets and demand generators that contribute to a positive visitor experience and motivate travellers to visit.	Data Collectors: Data collection team

Infrastructure/Place Based Business (IB)

There are 10 sub-categories of infrastructure/place based assets: Transportation, visitor services, accommodations, culture-heritage, nature based, trails and routes, man made attractions, shopping/retail, food and beverage, and conferences, meetings, trade shows.

Transportation

IB1: The Labrador Region offers variety for ground transportation services to accommodate visitors that arrive by air and don't have their own personal transportation options. [NO]

IB2: The Labrador Region destination offers variety of transportation options for travel to and within the region. [ALMOST]

IB3: There are reliable and frequent visitor friendly signage and way finding along popular tourist routes. [ALMOST]

IB4: The Labrador Region offers variety of water-based amenities to accommodate visitors travelling by watercraft. [ALMOST]

Table 15: Transportation Summary for Destination Labrador

Transportation Sector	Number servicing the region	Number of service locations	Year round service	High-season service only	6-month of the year service
Airlines	5	1 - 14	4	-	-
Ferry Companies	3	1 - 11	3	-	-
Car Rental Companies	7	1 – 5	7	-	-
Bus/Coaches	1	Multiple	1	-	-
Taxi/Limousine Companies	4	Multiple	4	-	-
Visitor Rail Access	0	-	-	-	-
Public Transit	0	-	-	-	-

Table 16: Cruise Summary for Destination Labrador

Cruise Lines	# Ports of Call Visited	Major Cruise Lines	Adventure/ Expedition Cruise Lines	# Guests for 2014	# Crew for 2014	# Itineraries
Adventure Canada	10		1	118	72	3
Holland America	2	1		1350	580	2
Linblad Expeditions	5		1	148	71	1
Ponant	2		1	248	136	1
Artic Kingdom	2		1	10	n/a	2

Table 17: Sample Air Travel Cost Comparisons with Air Canada

Destination Route Via Air Canada	Tango	Flex	Latitude
Vancouver/Goose Bay	$1,254	$1,936	$3,031
Toronto/Goose Bay	$1,107	$1,682	$2,727
Montreal/Goose Bay	$911	$1,137	$1,948
Halifax/Goose Bay	$675	$1,186	$1,705
St. John's/Goose Bay	$716	$869	$2,563
Philadelphia/Goose Bay	-	$1,379	$2,143
Philadelphia/Yellowknife	$1,023	$1,552	$2,538

Philadelphia/Whitehorse	$1,039	$1,397	$2,661
New York JFK/Goose Bay	$1,294	$1,056	$1,829
New York/ Yellowknife	$1,089	$1,442	$2,503
New York/Whitehorse	$1,089	$1,561	$2,58
Chicago O'Hara/Goose Bay	$1,309	$1,770	$2,582
Chicago O'Hara/Yellowknife	$1,067	$1,375	$2,692
Chicago O'Hara / Whitehorse	$1,063	$1,357	$2,569
Destination Route Via Provincial Airlines	**Alpha**	**Bravo**	**Charlie**
Halifax/Goose Bay	$1,359	$2,024	$2,537
Halifax/Wabush	$1,107	$1,772	$2,262
St. John's/Goose Bay	$804	$1,178	$1,540
VIA a Sample of US Carriers (USD)	**Delta**	**American**	**Alaska Airline**
Philadelphia/Anchorage	$763	$833	$959
New York (JFK)/Anchorage	$904	$915	$1,115
Chicago O'Hara/Anchorage	$854	$781	$813

Sources: Searched on June 15th, 2014 (using the lowest posted return rate per category which in many cases requires overnight accommodation for connecting flights) for the dates Aug 11 to 18 on: www.aircanada.com; www.provincalairlines.ca; and www.expedia.ca for the US rates, selecting only the lowest price category for comparison purposes to illustrate how much less it is for a US guest to travel to Alaska, than Canadian destinations.

Table 18: Labrador Straight Ferry Traffic 2000 - 2013

Total Volume of Straits Ferry Traffic, May-October 2000-13[48]

Year	Passengers	Passenger Vehicles (TEUs)	Commercial Vehicles (TEUs)	Total TEUs	% of Total TEUs	
					Passenger Vehicles (TEUs)	Commercial Vehicles (TEUs)
2000	46,273	15,514	4,993	20,507	76%	24%
2001	51,794	18,188	5,907	24,094	75%	25%
2002	62,731	21,599	6,978	28,577	76%	24%
2003	69,105	24,278	8,582	32,860	74%	26%
2004	65,623	21,986	7,716	29,702	74%	26%
2005	61,155	21,553	7,433	28,986	74%	26%
2006	62,783	22,626	7,079	29,705	76%	24%
2007	63,352	23,492	6,406	29,898	79%	21%
2008	64,949	24,088	8,230	32,319	75%	25%
2009	64,814	25,165	8,177	33,341	75%	25%
2010	77,350	31,227	10,828	42,055	74%	26%
2011	80,842	32,834	12,492	45,326	72%	28%
2012	79,780	33,643	15,599	49,242	68%	32%
2013 (May-July)	38,418	16,211	6,594	22,805	71%	29%

Total Volume of Straits Ferry Traffic, May-October 2012, by Port of Departure

2012	# Passengers	Passenger Vehicles (TEUs)	Commercial Vehicles (TEUs)	Total TEUs	% of Total TEUs	
					Passenger Vehicles (TEUs)	Commercial Vehicles (TEUs)
Blanc Sablon	39,867	16,540	7,250	23,790	70%	30%
St. Barbe	39,913	17,103	8,349	25,452	67%	33%
Total	**79,780**	**33,643**	**15,599**	**49,242**	**68%**	**32%**

[48] Straights Ferry Traffic, May to October 2000 – 2013 data extract provided by Destination Labrador.

Table 19: Infrastructure Improvements Required[49]

	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%
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

49 Government of Newfoundland & Labrador. (2012, Jan.). *Labrador travel survey Final Report 2011.* Pg. 57. A study conducted by MarketQuest Omnifacts Research for the Department of Tourism, Culture and Recreation.

KEY FINDINGS

According to industry stakeholders, the single biggest limitation to growing tourism in Labrador is transportation.

Accessing Labrador can be done in four ways: By air, ferry, ground via Quebec/Labrador City, and cruise ship (Table 15). Each one of these has their charms, advantages and limitations.

One DL Board member indicated that the difference 1000 extra visitors would make could be the difference between staying in business and having to close.

- Air access to and/or around Labrador is by Provincial Airlines, Labrador Air, Air Canada, Universal Helicopter, or PASCAN. All going through Goose Bay, the regional carriers cover an additional 13 communities and operate year round, albeit flights are highly subject to weather conditions. Table 16 was included, by stakeholder request, to illustrate how the costs to Goose Bay, relative to other northern Canadian destinations are consistency higher. As well, if the US traveller wishes to go to Alaska rather than Canada, this is significantly less expensive making it a challenge for northern Outfitters and Canadian destinations to compete on price – again reinforcing value has to be the driver;
- Three ferry companies provide water access: Labrador Marine operating the St. Barbe/Corner Brook to Blanc Sablon route, CAI Nunatsiavut operating the Northern Ranger and Apollo ferries (to be replaced in 2016) principally serving 9 communities on the east coast from Black Tickle to Nain; and the provincial Department of Transportation and Works servicing the Charlottetown-Norman Bay-Williams Harbour-Port Hope Simpson route;
- Cruise travel along the east coast of Labrador has been popular for years with adventure cruise ships catering to 250 guests. In 2013, Holland America made their inaugural journey to Red Bay with a 1350 passenger ship fundamentally quadrupling the number of guests disembarking this small community of 160 people and newly designated UNESCO world heritage site. While this expansion is occurring, Cruise NL has narrowed their mandate to focus on advertising and promotions leaving port-readiness and shore excursion development to host communities (Table 17);
- The demand for ferry traffic continues to soar. "In the past 10 years, 2002-2012, there has been a 27% increase in passengers; a 56% increase in passenger vehicles (TEUs[50]); and a 124% increase in commercial vehicles (TEUs). In the past 5 years, 2007-2012, there has been a 26% increase in passengers; a 43% increase in passenger vehicles (TEUs); and a 144% increase in commercial vehicles (TEUs)."[51] (Table 18).
- Seven car rental companies rent vehicles to Labrador, but due to the poor condition of the roads, it was reported that companies are reluctant to let guests booking in Newfoundland take the cars to Labrador because of rock and dust damage from gravel roads. A similar concern was raised by travel wholesalers such as Jonview who cannot work with Destination Labrador due to road conditions and the impact on motor coaches. Nunatsiavut is the one area of the province with no car rentals for guests;
- Traditional taxi service is restricted to Labrador City, Happy Valley-Goose Bay and

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[50] TEU stands for twenty-foot equivalent units. Most passenger vehicles are 20 feet or 1 TEU. A 70-foot tractor-trailer, for example, would be 3.5 TEUs.

[51] Straights Ferry Traffic, May to October 2000 – 2013 data extract provided by Destination Labrador.

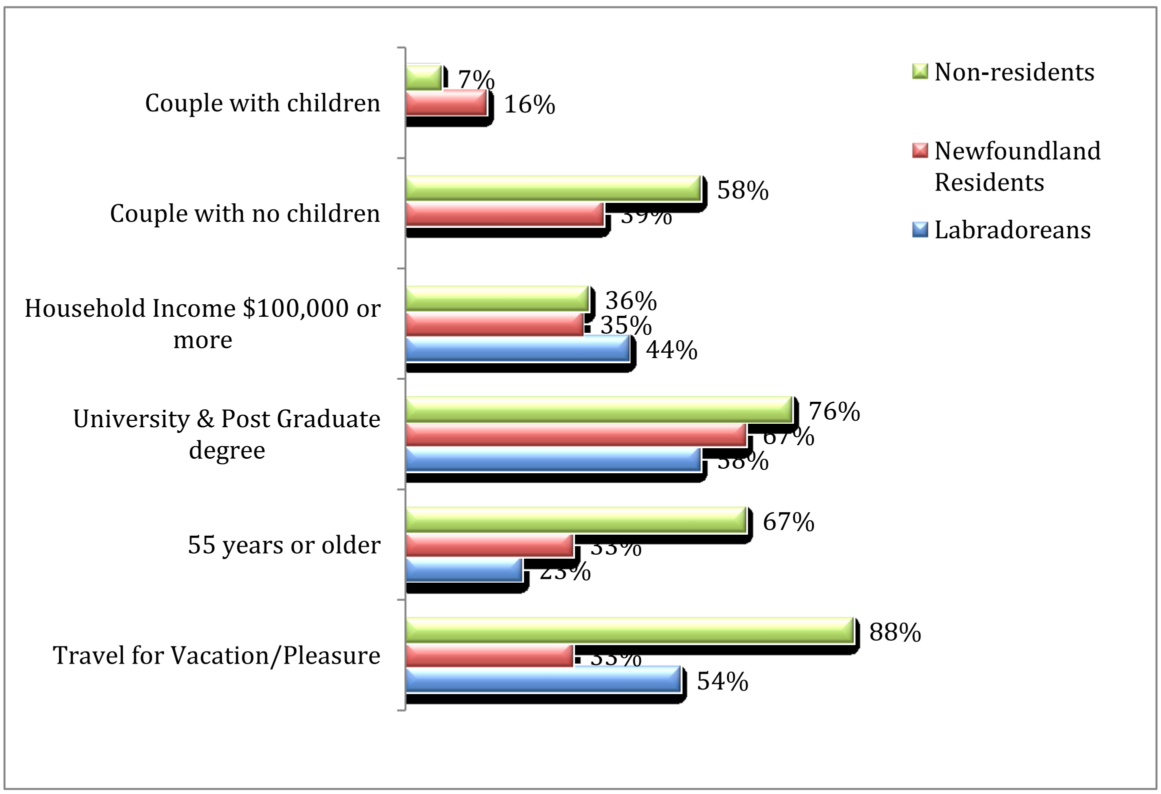
Loudres-Blanc Sablon, which will come as a surprise to travellers from away;

- There are 14 harbours that provide water access for vessels that bring tourists to the region. This is complemented by 10 more which are primarily for trade only and local use;
- The 2011 Labrador travel survey confirms key areas for improvement (Table 19) of importance to Labradoreans, Newfoundlanders and non-resident travellers. Improved road conditions, cell phone coverage, more highway rest stops, and more service stations/emergency highway services will need to be added for locals and travellers alike in the near future.

Implications/Considerations

- The cost of travel to and within the region is high which leads to the fact Labrador must develop, position and sell tourism based on the delivery of a high value proposition and target visitors with an ability to pay. Given reported reasons for travel, household income, education age, and travelling without children are all high, especially for non-resident travellers, this aligns with a traveller willing to pay if the value is there (Figure 6).

Figure 6 Select Labrador Visitor Demographics[52]



- The inability to book a rental car or secure a taxi is a significant limitation for visitors from away, and emphasizes the need for visitors to coordinate their travel with a tourism

[52] Government of Newfoundland & Labrador. (2012, Jan.). *Labrador travel survey Final Report 2011.* Pg 2 14 - 22. A study conducted by MarketQuest Omnifacts Research for the Department of Tourism, Culture and Recreation.

business who can make alternate ground transportation arrangements common to their community;

- The variability of flight times due to weather is a northern reality and one that the locals are well adjusted to. For travellers from away however, this has implications on their vacation planning, connector flights and personal comfort and must be managed carefully by tourism companies who by virtue of the domino effect may have a guest leave early or require an extra night. It also speaks to the value of packaged travel so the visitor has a host company to assist them with potential changes;
- The reports from Destination Labrador of the reluctance of some car rental companies in Deer Lake – a major Labrador gateway – to permit crossing over into the south coast, limits the invitation for guests to travel the Viking Trail and cross over. As the roads improve, this must be quickly promoted and communicated to the car rental companies;
- The interest in Holland America entering Labrador may be viewed as positive, however, it raises capacity management issues and opportunity maximization for communities of fewer citizens than arriving travellers. Such community's ability to host the large cruise ship volume and create a positive guest experience is at risk. This will need to be carefully monitored in the years ahead and the nature of the visitor experience carefully planned and managed;
- The potential for increases in cruise traffic at a time where Cruise NL no longer supports port-readiness and shore excursion development to host communities is cause for concern for Labrador as small communities need to have the local area capacity to understand the sector, its evolutions, and guest expectations. Long-standing companies like Adventure Canada have developed rich roots in coastal communities, unfortunately this is not the case with all companies. Understanding how to develop and price shore excursions, charge port fees and assess the overall benefits to communities is something that must be monitored, for one could argue it is the most enjoyable way to visit Labrador – but it must also be positive for the communities and businesses to derive appropriate benefits for their investment of time and energy; and
- Happy Valley-Goose Bay is reported by industry to be the major arrivals airport for tourism purposes and despite recent expansions, the arrivals and departure areas do not tell the Labrador story. A sense of arrival and opportunity to understand Labrador for those connecting through to other rural areas is required.

Visitor Information Services

IB2. The destination offers a variety of visitor information services to accommodate visitors travelling to and throughout the region. [ALMOST]

Table 20: Regional VICs

Provincial / Regional Visitor Information Centres (VICs)	**Number**	**% of total**
Total number of municipalities in the region	26	
Total number of VICs	3	
Number of provincial VICs	0	
Number of regional VICs	3	
Number of destinations with VICs	0	
Number with public washrooms	3	100%
Number with free internet access or Wi-Fi	2	67%
Number with password internet access or Wi-Fi	0	0%
Number that operate year round	1	33%
Number that operate 6 months of the year	0	
Number that operate high season only (Jun – Sep)	2	67%
Total number of VIC staff	Unknown	
Average number of staff per VIC	Unknown	
Visitor Services / Activities Available		
Provide print information	3	100%
Gift shop/retail	2	67%
Video viewing area	2	67%
Picnic area or place to sit and eat	3	100%
Able to purchase food	0	0%
Museum or displays/artifacts available	3	100%
Guest computer available for visitor use	3	100%
Place to plug in and charge electronics	3	100%
Staff regularly Tweet about destination	1	33%
Staff regularly update regional/VIC Facebook account	2	67%
Able to make bookings/reservations for traveller	3	100%

Key Findings

- There are three regional VICs servicing visitors within Labrador: Happy Valley/Goose Bay, L'Anse aux Clair and Labrador City. Port Hope Simpson is an informal VIC for it's the first town you travel through heading south from Goose Bay and the last you see before heading north for 400km. The Deer Lake airport is the provincially operated centre that serves Labrador as a gateway location where many visitors arrive, rent cars and travel the Viking Trail to Labrador. On the Quebec side, Baie Comeau is equally important;
- As almost 70% of Labradoreans and islanders travelled in passenger vehicles[53], access to basic visitor services is important, yet rather than focus on increasing VICs in the form of traditional infrastructure, it was suggested that creative solutions such as information kiosks, gas-station partnerships (as everyone must visit these), Wi-Fi stations, rest-stops with information would be of greater value to the visitor's journey;
- The roles of Visitor Servicing across Canada is being revisited by many jurisdictions due to the high cost of manning physical centers, evolutions in visitors' information needs due to technology, and the desire of destinations to use physical centres to differentiate and add value to the guest experience beyond providing information; and
- "Local involvement in the Visitor Centers adds authenticity and a certain unique character to each center. Nunavut has designed over 50% of its activities utilizing locals in its VICs, including sewing workshops and other traditional Inuit skills. This in turn draws curious visitors who reportedly are enthusiastic about observing and participating in these cultural activities."[54]

Implications/Considerations

- Visitor servicing in Labrador must be examined in consideration of the full customer experience typically associated with a VIC – the physical (access to washrooms, water, electronic charging stations, Wi-Fi), as well as the emotional (connecting with locals to secure local area information – be that in-person, via an online chat, or a knowledgeable person at a call centre in Goose Bay); and
- Exploring new relationships with private sector partners, such as gas stations or museums, where all guests must/can stop, providing an information kiosk, a service agreement and training to the businesses creates a win-win investment in visitors and community businesses.

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[53] Government of Newfoundland and Labrador. (2012, June). *Labrador travel survey final report.* Pg. 59. A study conducted by MarketQuest Omnifacts Research.

[54] GrantThornton (2013). *Visitor services program jurisdictional review: Destination BC.* Pg. 31.

Accommodation Base

IB3.1 The destination offers rooms at a variety of quality levels and price points. [ALMOST]

IB3.2 This inventory includes representation by "branded or flag" properties (widely known and respected) properties. [NO]

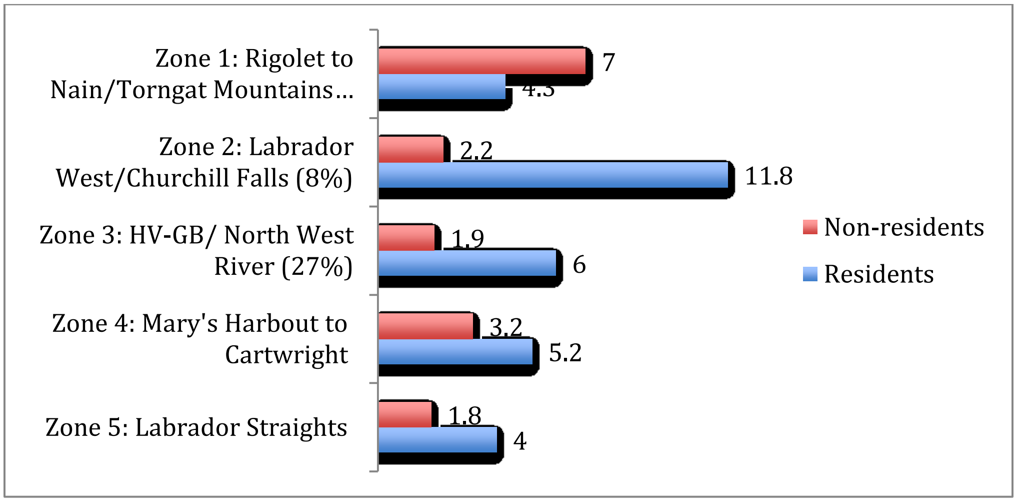
Table 21: Accommodation Statistics

Category	# Of Properties	# Of rooms /sites	Daily Price Range	% Year Round	% High Season (May – Sept)	% Open at least 6 months
Hotel/Motel	20	603	$65 - $300	100%	-	-
B&B	16	55	$50 - $160.	94%	-	6%
Inn	2	21	$80 - $155	50%	50% (yes)	-
Cottages, Vacation House Rental Hostels	9	43	$99 - $800*	78%	11%	11%
RV Parks and Campgrounds	7	157	$11.50 - $35	14%	71%	14%

Note 1: The Battle Harbour Cottage day rates (up to $800/day) is to rent the accommodation for the entire group, plus a per person fee of $150/day/per person which includes ferry to the island, 3 meals per day, plus site admission. Also, there are no properties identified as resorts lodges, or house rentals. Lodges associated with Outfitters are captured further in the analysis.

Note 2: Information on the Outfitters accommodations was not available as most only sell packaged travel and some only sell privately, not to the general public.

Figure 7: Labrador Economic Zones Overnight Visits for Resident vs. Non-Resident Travellers[55]



Note: The numbers following each horizontal bar represent the average number of nights stated in each of the zones by residents and non-residents.

Table 22: Accommodation Used by Resident and Non-Resident Travellers in Labrador[56]

	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%

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55 Government of Newfoundland and Labrador. (2012, June). *Labrador travel survey final report.* Pg. 25 & 26. A study conducted by MarketQuest Omnifacts Research.

56 Government of Newfoundland and Labrador. (2012, June). *Labrador travel survey final report.* Pg. 28. A study conducted by MarketQuest Omnifacts Research.

Note: Hotel and motels were the most prevalent accommodation choice for Newfoundland residents and non-residents alike. Non-residents favored a range of commercial accommodations (B&B, campgrounds/trailer parks, camping), whereas the majority Newfoundland residents stayed with family and friends.

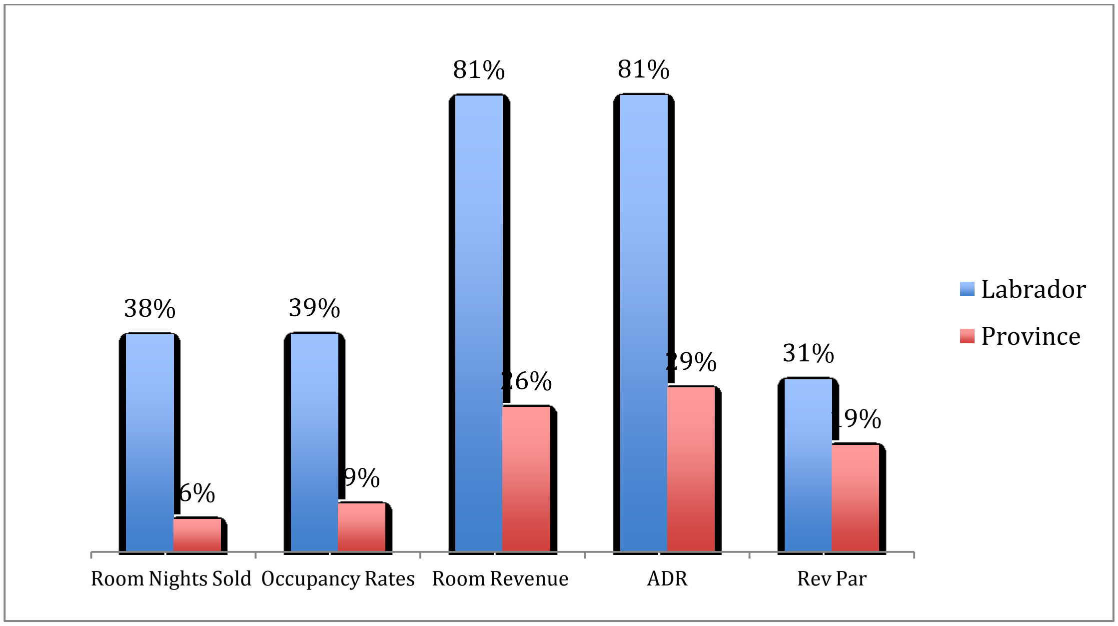
Table 23 Accommodation Type by Purpose[57]

	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%

Note: This table highlights that most people travelling for business, fishing, vacation or pleasure stay in paid roofed accommodations for residents and non-residents.

57 Government of Newfoundland and Labrador. (2012, June). *Labrador travel survey final report.* Pg. 29. A study conducted by MarketQuest Omnifacts Research.

Figure 8 Occupancy Comparisons (increases in %) from 2009 - 2013 for Labrador & NL



Note 1: The percentages in this table were based on Tables 48 and 49 in this report, which were created from Occupancy, REVPAR and ADR Province, Labrador Region, Zone 1-5, 2003-2013 data provided by the Department of Tourism, Culture and Recreation, 26 Feb 2014.

Note 2: For occupancy rates, a 9 Jun 2014 email from TCR Research added that the provides doesn't report as a percentage change, rather as a change in percentage points. The change in provincial occupancy from 2009 to 2013 would be 4.07 percentage points, and 17.32 for Labrador – a different lens, but also illustrating the same point – growth in Labrador. This table was presented with this view to get a general sense across all categories of the change in the provincial growth when Room Nights sold are a number, Occupancy rates are a percentage, and room revenue, ADR and RevPar are tracked in dollars.

Key Findings

- Overall, from a statistical lens, Labrador accommodations are out-performing the provincial average and have experienced significant growth from 2009 - 2013 in ADR, Rev Par, revenue, occupancy and room nights sold (Figure 8). Anecdotal input from industry stakeholders however suggests that growth in demand for accommodations by the resource industries may be impacting these numbers. However, this conclusion cannot be drawn from the data to verify this. *Future studies may want to examine this specific variable as it was also a question raised in the Eastern;*
- Capacity issues were identified in Goose Bay, Labrador City and Port Hope Simpson, and as well in iconic drivers such as Red Bay NHS, which sees 7000 - 8500 visitors annually yet, has one cottage accommodation with 4 rooms! Having travelled 82 km from Blanc Sablon visitors are forced to back-track 77 km to L'Anse aux Claire or continue 89 km to Mary's Harbour and sailing to Battle Harbour National Historic District of Canada;
- There are no branded properties in Labrador;
- Price points offer choice from $60 to $85/night to $326 to $429 depending on the community. Rates for cottage and vacation homes in Table 18 are skewed due to Battle Harbour National Historic District of Canada which often includes a ferry ticket and meals as this is how they package some of their accommodations;
- Limited accommodations exist in Nunatsiavut in general, and when seeking to attract a high-end, high-value traveller, managing the expectations of travellers to a rural, northern, rustic standard will be important if they are not affiliated with one of the outfitting lodges; and
- Unlicensed accommodations exist in Labrador, as in the other regions of NL, however, DL works diligently to monitor these companies, identify them and support them

securing licensing.

IMPLICATIONS/CONSIDERATIONS

- As the resource industry's needs for accommodation increases, visitor availability decreases while costs are higher. This is a catch 22 for hoteliers who can secure significant block bookings with guaranteed revenues vs. transient visitors who stay 2 to 6 days. Creative solutions are required to address the accommodation challenges for both the resource and tourism industries, for with limited volume on tourists the ROI can be challenging;
- Communities with limited accommodations should encourage accommodation development through municipal incentives and other economic development strategies to lure potential developers;
- Development of publicly operated RV/camp grounds should be encouraged, or in the least making public lands available to developers at affordable or subsidized rates if they build a RV park or campground;
- Encouraging the creation of more B&B's is another option but the availability of homes and cost of building in small remote communities may be beyond the revenue generated from such an investment without government support; and
- Lodges built for outfitters represent a unique opportunity to expand their operating season for visitors; those around Goose Bay were identified as particularly interesting based on their location to the gateway airport.

Culture – Heritage Based Assets

IB4: The Destination has cultural and heritage tourism assets at a variety of price points. [ALMOST]

Table 24: Number of Culture-Heritage Based Assets in the Destination

Type	# of Properties	Adult Price Range
Art Galleries and Murals	3	Free – ranging ticket prices for events
Artists in Residence Program	1	$6.00
Culture/Heritage	18	$3.00 - $10.00
Cultural Experience	6	Free to $9.00
Genealogy	2	Donations
Lighthouses	1	$6.00
Monument, memorials & plaques	4	Donations to $6.00
Museums/Cultural/Historic Attractions	17	Free to $9.00
National Historic Sites	5	Free to $9.00
Provincial Historic Sites	1	$6.00

Note: Additional types of themes culinary establishments tracked with the TDVAA study, but not present in TDMS for Labrador includes: archeological sites, eco-museums, and outdoor theatres.

Key Findings

- The region has 58 culture and heritage assets that are an essential element of the Labrador visitor experience, connecting the social, cultural and historical elements of the destination. They attract visitors on an annual basis primarily in high season with Red Bay NHS being the most significant international heritage asset having received UNESCO designation in 2013, it has historically received between 7600 and 8500 visitors annually;[58]
- The strongest product and most developed capacity resides in the south, which coincides with the highest percentage of visitor volume in the region;
- Nunatsiavut has the second strongest product availability in Labrador, with the most designated heritage sites in the province. Developmentally, the NG government continues to strategically work with communities, operators, the Nunatsiavut Group of Companies and other government agencies to build their capacity to celebrate the Inuit story and create engaging and memorable visitor experiences;
- Significant investments are en route to develop targeted iconic attractors including Red Bay NHS, Battle Harbour Provincial Historic Site, Hebron, the Moravian Mission, and the future Torngâsok Cultural Centre in Nain. These assets have national, provincial, regional and local significance and attempt to articulate the natural and built heritage in the region;
- The celebration of the natural and built heritage of the region varies; the majority are

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[58] Parks Canada (2011). Red Bay National Historic Site: State of the parks report. Pg. 7.

passive and self-discovery, others engage staff and story tellers at certain times of the year (e.g. Red Bay NHS) or on demand (e.g. Hopedale Mission);

- The majority of these assets are not-for-profit operations that face challenges like most heritage attractions in Canada related to sustainability, securing volunteers and succession planning, lack of programming for which a fee could be charged, and infrastructure costs (from repairs to renewing/building exhibits);
- Similar to the Eastern region, few charge fees and if they do, they are modest ranging from \$3 to \$9, which given the core demographic of the visitor and their ability to pay is a missed opportunity; and
- Government funding programs provide some assistance related to infrastructure development and staffing but the availability of funds has diminished in recent years putting significant strain on the present assets.

Implications/Considerations

- Labrador has four distinct stories, from the Inuit in the north, the European and fishing heritage in the south, resource development in the west to trappers in Central, each offering a product development opportunity and potential diversity in experience for visitors:
- Determining how each region in Labrador can contribute to the story can help guide investment in activities, people and programs so that as visitors journey through a sub-region, they gradually build their knowledge and understanding of people, place and culture;
- Currently the stories are static, to introduce fees sites must offer engagement, authenticity and personal connections to increase the value visitors receive;
- As a cornerstone to the visitor experience to Labrador, tap into the visitors desire to connect in meaningful ways, engaging with the people and culture;
- Invest in your icons and the communities that support them to make them strong in the next five years while other areas are building capacity;
- Strategic investment is paramount as Labrador opens up and increased traffic is realized as a result of the Trans Labrador Highway and increased efforts to package the north coast via the Northern Ranger. Rather than massive infrastructure investments, smaller project based initiatives that build capacity in multiple communities along a travel route are in the best interest of the visitor experience, and will spread the governments' investment in building capacity throughout the region; and
- Sustainability requires a shared responsibility between federal, provincial and municipal governments in collaboration; however, not-for-profit organizations must also proactively develop their own sustainability strategies by undertaking a critical review of their current operations. This includes identifying options for on-site programming (that charge a fee above the cost of general admission), creative uses of technology, and collectively assessing if introducing admission fees for all sites would be an option to create a level playing field and consistent visitor expectation.

Nature Based Assets

IB5: The Destination has nature-based assets at a variety of price points. [YES]

Table 25: Number of Nature Based Assets in the Destination

Type	# of Sites / Properties	Price Range
Beaches	4	-
Ecological Reserves	4	-
Geology and Fossils	2	$6.00
Lookout / Viewing Point	5	-
National Parks	1	-
Natural Attractions	5	-
Provincial Parks	1	-
Wildlife Reserve	2	-
Other - Cenotaph	1	-

Note: Additional types of themes culinary establishments tracked with the TDVAA study, but not present in TDMS for Labrador includes: Gardens/community parks and nature houses.

Key Findings

- A good array of nature based assets exist and are accessible to visitors, near communities with the most plentiful opportunities around Labrador City and along the Labrador Coastal Drive where many are less than a km from the ocean;
- Self-discovery, such as whale watching, nature viewing and bird watching can all be enjoyed from many of these sites. While these are attractive options for guests, they do little to contribute any real direct economic impact to the site or community;
- Only one site, the Point Amour Lighthouse Provincial Historic Site charges a fee, the others offer free access; and
- With four ecological reserves and two wildlife reserves there may be the potential to attract travellers who are interested in these unique ways to explore nature.

Implications/Considerations

- This is not a priority development area for Labrador with greater emphasis placed on trails and routes, which appreciably has some overlap from a visitors perspective; and
- Measure interest among nature based tour operators in their willingness to consider Labrador as a themed nature based experience, for example birders, geologists, etc.

Trails and Routes

IB6: The destination has driving routes that direct visitors through the Destination (e.g. Arts Trails). [YES]

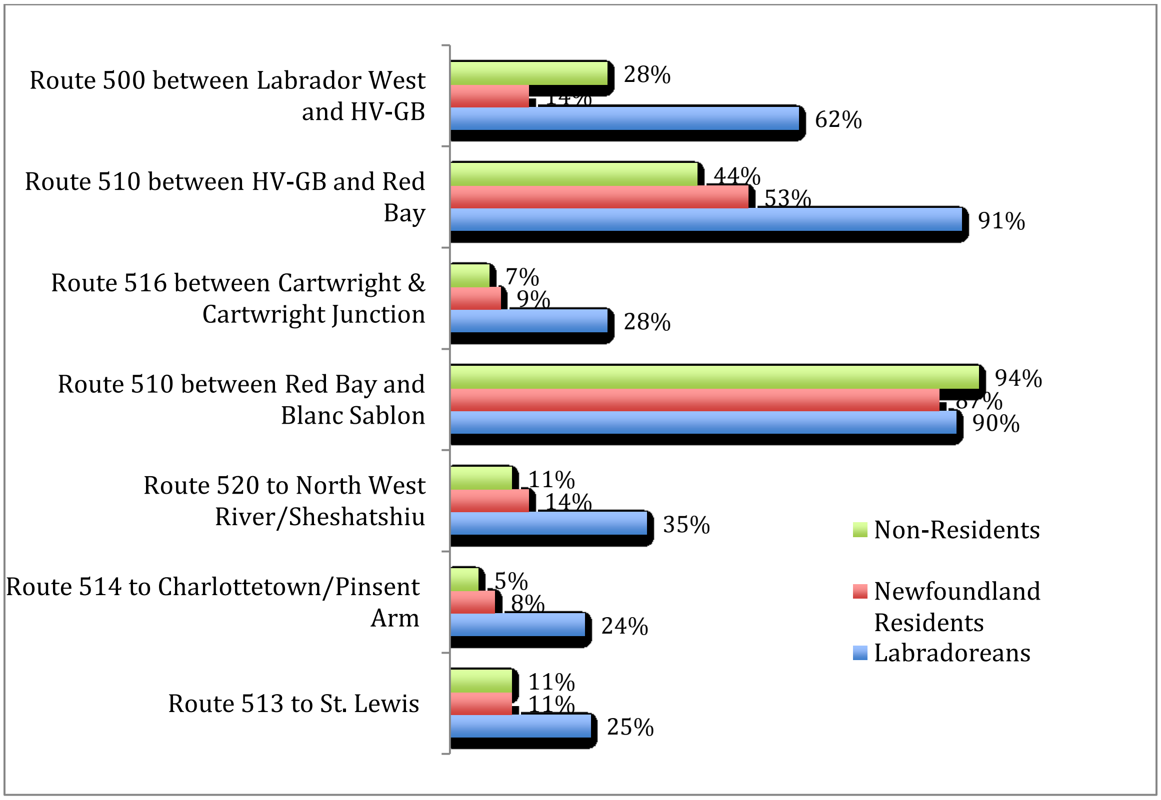
IB6.2 The destination has a variety of activity-based trails through the region to engage guests, (E.g., snowmobile trails, ATV trails, etc.). [YES]

IB6.3 The destination has a variety of walking trails through the region to engage guests. [YES]

Table 26: Trails & Routes in the Destination

Type	# Routes
Themed driving routes with interpretation	0
Themed driving routes with signage	5
Walking/hiking with interpretation	8
Walking/hiking with signage	29
City/town based heritage interpretive trails	21
ATV Trails	1
Back Country Hikes	5
Coastal Trails	22
Hiking and Walking Trails	34
Town and Country Treks	2
Trails in National and Provincial Parks	6
Snowmobile Trails	5
Scenic Touring	4
Self Driving Vacation	4
# that meet provincial standard	26

Figure 9 Percent of Travellers Along the Trans Labrador Hwy[59]



59 Government of Newfoundland & Labrador. (2012, Jan.). *Labrador travel survey Final Report 2011.* Pg. 39-41. A study conducted by MarketQuest Omnifacts Research for the Department of Tourism, Culture and Recreation.

Figure 10: Trans-Labrador Hwy Route with Newfoundland Resident Travel Data

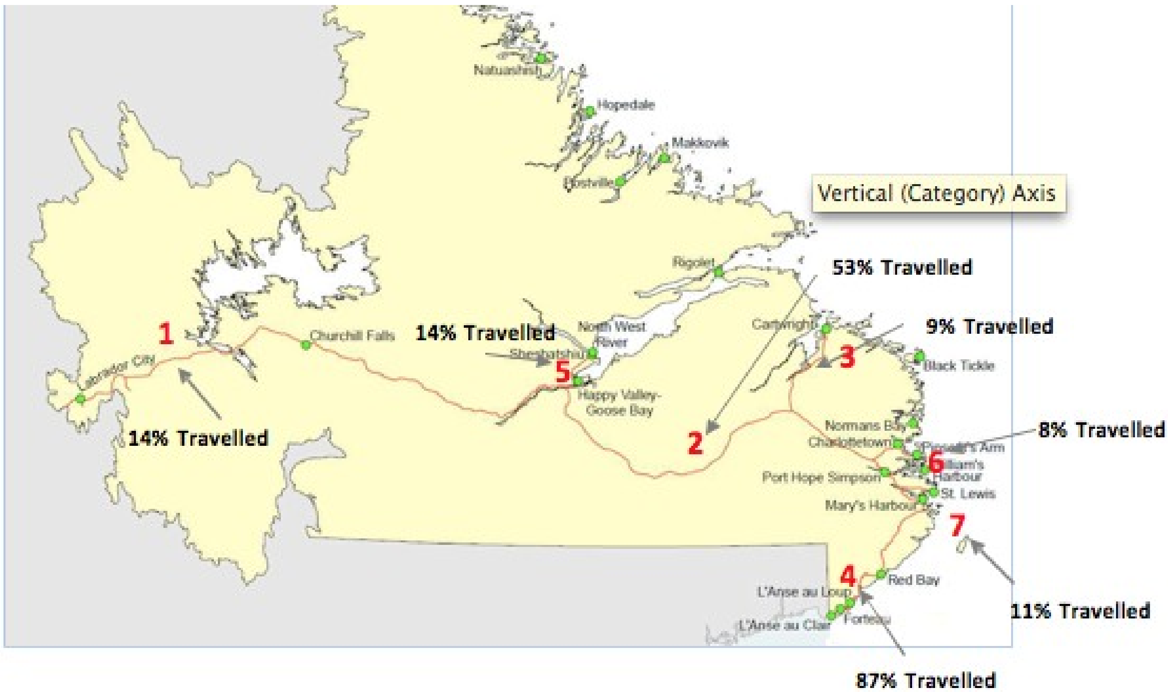


Table 27: 2011 Non-Resident Travel Parties Trail Hiking Areas of Province Visited (and stayed at least one overnight) (% Parties - May to October) [60]

	Overall	Those Participating in Trail Hiking
Zone 1: Rigolet to Nain	0.3%	0.3%
Zone 2: Labrador West/Churchill Falls	0.5%	0.4%
Zone 3: Happy Valley/Goose Bay/Northwest River	0.6%	0.5%
Zone 4: May's Harbour to Cartwright	0.7%	1.1%
Zone 5: Labrador Straits (L'Anse Au Clair to Red Bay)	1.9%	2.4%
Zone 6: Viking Trail, St. Anthony, South West to Plum Point, East to Roddington/Englee	12.3%	21.9%
Zone 7: Gros Morne Area, Viking Trail North to and including Plum Point	23.2%	42.3%
Zone 8: Deer Lake/Humber Area	12.3%	14.7%
Corner Brook /Massey Drive	11.5%	12.6%
Zone 9: Stephenville/Port-au-Port/Burgeo	6.0%	7.6%
Zone 10: Port-aux-Basques/Doyles/Rose Blanch	8.2%	11%
Zone 11: Baie Verte/La Scie/Green Bay	4.2%	5.9%
Zone 12: Grand Falls Windsor Area	8.2%	9.5%
Zone 13: Bay D'Espoir	0.8%	0.8%
Zone 14: Gander/Twillingate East to Terra Nova	21.7%	29.6%
Zone 15: Clarenville/Bonavista Peninsula Area	18.7%	26.9%
Zone 16: Burin Peninsula	3.3%	4.0%
Zone 17: North West Avalon	8.2%	8.6%
Zone 18: Argentina/Placentia Area	5.4%	7.2%
Zone 19: North East Avalon (Excluding St. John's and Mount Pearl)	8.6%	7.8%
St. John's CMA	66.3%	64.0%
Zone 20: Southern Shore Area	5.0%	9.2%

Note: % of parties visiting is not additive across economic zones – that is the same party could have spent at least one night in more than one Zone and therefore would be included in the percentage for all zones visited.

[60] Government of Newfoundland and Labrador Tourism Research Division. (2011). 2011 Exit Survey – Profile of Non-resident Trail Hikers.

Key Findings

- There are 40 routes and trails from the mega investment in the Trans Labrador Highway to regional development trails such as the Pioneer Footpath and smaller sites requiring special access on Saddle Island;
- There is an extensive four-season trail capacity that includes contributions to the enjoyment of winter activities throughout the region. Trails also provide the opportunity to stop, stretch your legs and enjoy the quiet tranquility of the north;
- 50% of the assets are along the Labrador Coastal Drive, 80% are featured on a website, but none have TripAdvisor accounts, and less than 10% are on Facebook;
- The trails in the Torngat Mountain National Park enjoy national and provincial acclaim;
- The route between Red Bay and Blanc Sablon is by far the most popular route for non-resident, Newfoundland and Labradorean travellers, followed by HV-GB to Red Bay. The least travel direction is route 514 from Charlottetown to Pinsent (Figure 10). However it is important to note that these figures only represent those who participated in the Labrador Travel Survey and should not be generalized to the population at large;
- According to the 2011 Exit Survey – Profile of Non-resident Trail Hikers[61] travellers from Ontario and Other Canada make up almost 62% of non-resident trail hikers to Newfoundland and Labrador;
- Travel parties participating in trail hiking spent close to two weeks in the province during their trip;
- Travellers participating in trail hiking as a trip activity report higher than average in-province expenditures;
- St. John's and the Gros Morne/Viking Trail are the key destinations for non-resident visitors participating in trail hiking;
- Compared to all non-resident visitors, travel parties participating in trail hiking as a trip activity reported higher than average party visits to many of the rural destinations areas of the province and lower than average party visits to the NE Avalon/St. John' area; and
- Trail hiking, as a trip activity, in Labrador rates for non-resident travellers (25%), compared to residents (16%) provincially that participate in trail hiking.[62]

Implications/Considerations

- To expand the visitor experience on trails, more information should be communicated to travellers on how to enjoy the trails. This includes detailed maps with degree of difficulty, information on wildlife safety readily available, safety information when 'off the beaten track', photography vistas, average length of time to enjoy the journey, etc.,; and
- The Atlantic Canada Trail Association has produced an Assessment Trail User Guide, the contents of which details the specific requirements for trail development and maintenance; those involved in trail development should (if they have not already) avail themselves to this helpful tool and determine "trail readiness" within the Labrador Region.

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[61] Government of Newfoundland & Labrador. (2011) *2011 Exit Survey – Profile of Non-resident Trail Hikers.* Pgs. 2-5. Note from the TCR Research Team 9 Jun 14: The exit study can tell whether visitors participated in trail hiking and where they stayed overnight, but no conclusions can be draw where (in which areas of the province) they hiked, so one cannot conclude they also hiked in Labrador.

[62] Government of Newfoundland & Labrador. (2012, Jan.). *Labrador travel survey Final Report 2011.* Pg. 29-30. A study conducted by MarketQuest Omnifacts Research for the Department of Tourism, Culture and Recreation.

Recreational and Man-Made Attractions

IB7. The Destination has man-made attractions at a variety of price points. [NO]

Table 28: Recreational & Manmade Attractions in the Destination

Assets	Number	Price Range
Total Number of man-made attractions	6	-
Driving Range	1	Prices not provided
Golf courses	2	Green fees $20-$25
Other: (3 snowmobile clubs and 1 ski club)	4	$100 per year (Snowmobile)

Note: Recreational and man-made attractions tracked in the study but not present in TDMS for Labrador include: marinas, mini-putt, paintball, rock-climbing, aquariums, family amusement parks, outdoor theatre, science centers, downhill skiing, snowboarding.

Key Findings

- There are very few man-made assets in Labrador and of those that exist, they cater primarily to the local market and wouldn't be considered a major tourism draw.

Implications/Considerations

- This is not a priority for destination development relative to other opportunities; and
- The one exception could be the snowmobile trails if a push to increase winter tourism given 54% of Newfoundlanders and 30% of Non-residents surveyed in the 2011 Labrador Travel Survey expressed interest in a winter trip.[63]

Shopping & Retail

IB8: The Destination has shopping and retail at a variety of price points. [ALMOST]

Table 29: Shopping Businesses in the Destination

Shopping	# Of Properties	% Year Round*	% 6 month + operation*	% high season only*
Art or Craft *Studios*	7	70%	9%	22%
Craft Shops	20			
Commercial Art Galleries	3			
Souvenir Shop	15			

[63] Government of Newfoundland & Labrador. (2012, Jan.). *Labrador travel survey Final Report 2011.* Pg. 52. A study conducted by MarketQuest Omnifacts Research for the Department of Tourism, Culture and Recreation.

Key Findings

- There is a strong arts and crafts component to the retail assets tracked in TDMS as contributing to the visitor experience, 77% are open year-round;
- The majority of the retail outlets are found along the Labrador Coastal Trail where visitor volumes are the highest;
- Types of products include: stone and bone sculptures, wood sculptures, grass works, dolls, paintings, clothing, jewelry and crafts. The demand for Labradorean product is high and available in many communities; the artisans are unable to keep up with demand. In Nain for example, the Torngats Arts and Craft Centre opened a seasonal store at Base Camp and sold out of their product in 2013, impacting the product available in the local community store;
- Product pricing ranges from $20 for trinkets and memorabilia to high end sealskin boots selling for $500+ and Inuit Art ranging in price from $100 to $10,000+ for famous artist such as John Terriak and Billy Gautier;
- The variance in quality is evident from local citizens who enter restaurants to try to sell product to visitors during a meal, to product that meets the Craft Council of NL standards, to product accepted for sale at internationally renowned outlets such as the Spirit Wrestler Gallery in Vancouver;
- Productions also varies from funding art creation projects through government sponsored programs in Rigolet, to entrepreneurial locals working from their homes;
- One of the longest standing gallery owners in Goose Bay, the Birches Gallery that proudly sells only Labrador Art of the highest international quality is closing and moving its business to Nova Scotia to be closer to more lucrative markets, this is a significant loss for Labrador;
- There is a weak retail structure underlying one of the most significant industries that celebrates people, culture and presents the authentic connection to Labrador. Few retail their goods online with the exception of the galleries;
- There is a missed business opportunity to work collaboratively through co-ops to leverage purchasing of materials, extending sales online, and marketing. Nunatsiavut has identified strengthening the arts and crafts potential, one of their top areas of investment; and
- Labradorean artists do not use the unique Labradorite rock for the cost of mining is too high, so when a visitor finds this type of product, it has been purchased from a seller outside Labrador.

Implications/Considerations

- Explore merchandising lower end themed products for casual visitors travelling the Trans Labrador Highway and visiting special places such as Red Bay UNESCO World Heritage Site;
- Support individual artists in marketing and selling online, also profile artisans in social media and online;
- Increase the connection of visitors to artisans through programs and workshops that command a fee and make personal connections to the local people. Following the lead of entrepreneurs such as Molly White in Woody Point NL with her Molly Made Fiber Arts business (http://www.mollymadefibreart.com/) can demonstrate a standard from moving from a dream to international sales in five years; and
- Examine if there were a way to source and access Labradorite rock for use by local area artists in creating everything from jewelry to sculptures.

Culinary, Food and Beverage

IB9.1 The Destination has restaurants with a variety of options and price points. [NO]

IB9.2 The destination offers food and beverage options that respond to the needs of various travellers. [NO]

IB9.3 The destination offers other culinary themed establishments that purposely attract visitors. [NO]

Table 30: Culinary, Food and Beverage in the Destination

Food and Beverage	#	% Year Round	% 6 month + operation	% high season only	# with critical acclaim	# with accredited chef	Range of main entree
Total Number *	39	97%	-	3%	-	-	-
Casual Dining	21						
Catering	0						
Fine Dining	2						
Fast-Food	16						
Coffee Shops	5						
Bakeries	1						
Pubs/Bars	8						

Note: As reported by E-Dining. The Restaurant Association of Newfoundland and Labrador database. Some establishments are represented in more than one category.

Table 31: Specialized Food and Beverage Options in the Destination

Food and Beverage*	Number	Percentage
Vegetarian/Vegan	15	38%
Gluten Free	0	-
Heart Healthy (e.g. low sodium, low fat, whole grain)	3	8%
Local foods (from the region)	16	41%
Local Newfoundland & Labrador recipes	18	46%
Local beverages (wine, beer, ciders)	16	48%
Ethnic food (Chinese, Greek, Italian, etc.)	3	8%
Child menus	20	51%
Senior menus	0	-

Table 32: Culinary Themed Establishments in the Destination

Culinary	# of Properties	% Year Round	% 6 month + operation	% high season only	# with Hands-on Experiences
Farmers market (Goose off-peak)	1	-	-	100%	-

Key Findings

- There are 39 dining establishments reported in Labrador, none with provincial, national or international acclaim;
- 97% are open year-round and cater primarily to the local market and resource sector;
- The variety is limited with the majority being categorized in TDMS as casual dining (54%) and fast food (41%). Where there is diversity it is in Labrador City and Goose-Bay where the population bases are larger and the influence of the resource workers generates demand;
- Specialized food options are also limited with less than half serving local foods (41%), using Newfoundland recipes (46%) or local beverages (51%) – all of which are appealing features for travellers;
- Children's' menus are offered at 51% of the businesses but none offer seniors menus;
- The challenge in serving variety is linked to the fact the majority of customers are locals and travellers are not the priority with the exception being in the high season, when certain establishments do make an effort to diversify the menu where ingredients are available;
- Another challenge is recruiting and keeping cooks, and chefs are a rare commodity; Battle Harbour being an exception;
- Additional types of themed culinary establishments tracked with the TDVAA study through E-dining, but not present in Labrador include: culinary schools, vineyards/wineries, U-picks, farm gate/fresh sea food, root cellars, breweries, and organic farms; and
- Off-season the food options are limited, as are the hours of operations. This must be transparently communicated to guests similar to the ways B&B's ensure guests know

the hours when breakfast is served.

Implications/Considerations

- Creative menu planning emerged as a solution for restaurants willing to have a few items for visitors on their menu. While typically 7-days menus are the norm, given people are moving between destinations, rotating 3-day menus would like cover most guests staying for a few days;
- Where businesses are able to retain a Red Seal chef or highly qualified cook, these individuals should be engaged to provide training to others (at appropriate times, perhaps in off season) to optimize their talents and provide additional revenue for these individuals;
- Given the primary demographics for Newfoundland and non-resident travellers to Labrador, introducing seniors' meals and more health options would be beneficial;
- Food and beverage options are adequate, however, if Labrador is going to seek higher end travellers willing to pay for value, the value must be there for operators to benefit;
- Given the current product offer, differentiating and marketing this difference to guests is highly advised; and
- Restaurants working with tour operators or businesses packaging travel (leisure or conference market) should be encouraged to enhance the food options for these opportunities represent pre-booking and pre-planning.

Conference, Convention, Trade Show

IB10: The destination offers conference, convention, and trade show space to serve as a primary draw for markets of different sizes. [YES, RELATIVE TO A RURAL NOTHERN LOCATION]

Table 33: Conferences, Convention and Meeting Space in the Destination

<table>
<tr><th colspan="2">Conference/ Convention Centres/Meeting Space</th><th>Hotels/ Resorts</th><th>Retreat Centres</th><th>University /Colleges</th></tr>
<tr><td>Number of Venues</td><td>12</td><td colspan="3" rowspan="10">This level of detail not provided</td></tr>
<tr><td>Person Capacity (Total theatre seating)</td><td>4,609 (10 venues)</td></tr>
<tr><td>Person Capacity (Venue range)</td><td>50 – 1915 people</td></tr>
<tr><td>Person Capacity (Ballroom rounds/seating)</td><td>2,915 (8 venues)</td></tr>
<tr><td>Trade show or exhibit space (square footage)</td><td>1,000 (1 venue)</td></tr>
<tr><td>Plenary Space and Break Out Rooms</td><td>5 Sites</td></tr>
<tr><td>Onsite Catering</td><td>9 Sites</td></tr>
<tr><td>Onsite AV Equipment/ Support</td><td>3 Sites</td></tr>
<tr><td>Sufficient overnight accommodation</td><td>7 Sites</td></tr>
<tr><td>Open Year-Round</td><td>100%</td></tr>
</table>

Key Findings

- Year-round meetings and convention business is located in all four regions of Labrador with the greatest capacity in Happy Valley-Goose Bay in the Broomfield Arena which can accommodate 1915 people (seated) and the Labrador City Arena (1200 seated). The majority of other meeting and trade spaces range in capacity from 50 to 325 people;
- There is only one major annual draw, *Expo Labrador*' an annual peak-season 'economic and cultural' conference. Smaller communities like Hopedale rely heavily on the meetings business where the National Assembly is located attracting the transient business traveller on a regular basis; and
- As a consumer, finding information on meeting space is difficult. It is not well indicated on websites and the standard information needs of a meeting planner are not readily available, such as floor plan layouts, audio-visual capabilities, break-out room spaces, etc.

Implications/Considerations

- Off-season capacity exists for small-scale meetings that may have the same impact as a larger conference in peak-season;
- Municipalities and venues need to be realistic in terms of their ability to proactively attract M&C business, limitations in venues, accommodations and basic meeting planner requirements will limit any potential to develop this market;
- The opportunity exists to secure smaller corporate meetings associated with the resource sector however venues must be trained in service delivery for the corporate meetings market;
- Developing and delivering M&C conference readiness training may be warranted;
- Communities that see potential from the M&C market should conduct an M&C market readiness assessment to identify areas where development is required; and
- Improve the base information needed for meeting planners and improve the profile of this capacity on websites.

Activity-Based Tourism Businesses (AB)

AB1: The destination has activity-based businesses offering a range activities for visitors to engage in. [YES]

AB2: The destination offers flexibility and choice for length of engagement, level of interaction, price point. [ALMOST]

AB3: The destination has a number of tour operators that package and sell domestically. [YES]

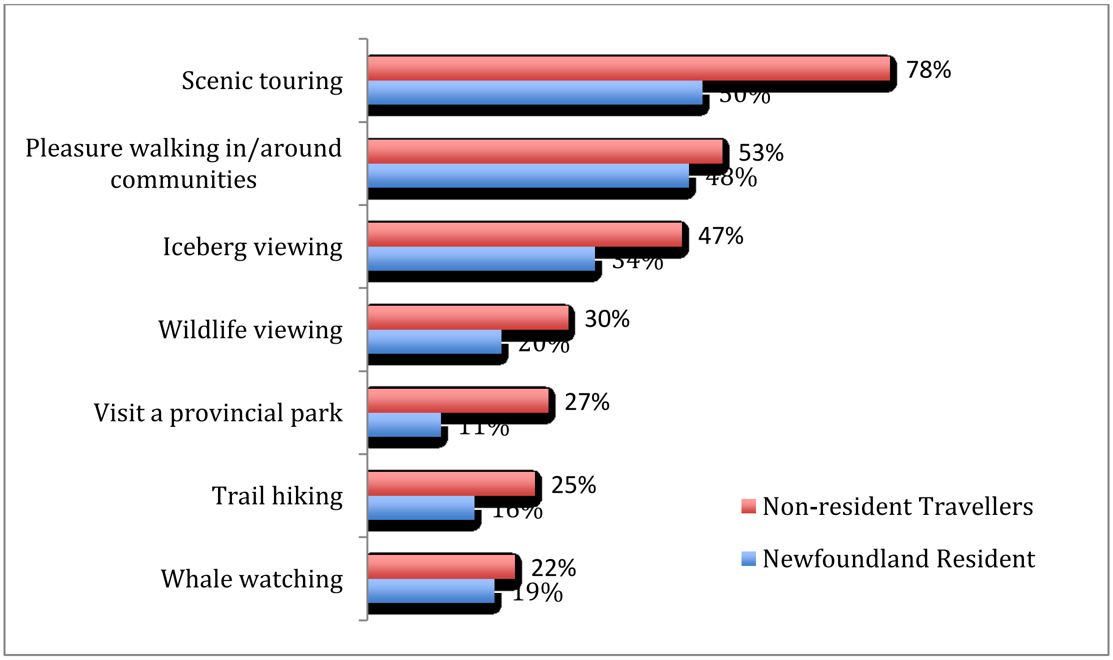
AB4: The destination has a number of tour operators that package and sell internationally. [YES]

Table 34: Activity-Based Tourism Businesses in the Destination

Activity Based Companies	# Of Visitor Opportunities	Seasonality (INFORMATION NOT PROVIDED FOR ALL ASSETS)		
		% Year Round	% 6 month + operation	% High season only
Total Number of Companies	**N = 12**	**25%**	**25%**	**50%**
Angling	1		100%	
Bird Watching Boat Tours	2			100%
Bus	1	100%		
Cross-country Skiing	2			100%
Dog Sledding	1			100%
Downhill Skiing	1			100%
General Sightseeing	2	50%		50%
Group Sightseeing	2	50%		50%
Hiking and Walking	6	17%	50%	33%
Hunting Outfitters	1		100%	
Iceberg Watching	2			100%
Iceberg Watching – Boat Tour	3			100%
Kite Sailing	1			100%
Nature and Wilderness	6	17%	50%	33%
Recreational Fishing Boat Tour	1			100%
Sea Kayaking	2			100%
Snowmobile	3			100%
Snowshoeing	2			100%
Step On Guide	1	100%		
Tour Package	3	33%	67%	
Tour Planning	1	100%		
Whale Watching	1	100%		
Whale Watching Boat Tour	3	33%	67%	
Winter	1			100%

Note: Additional types of activity based companies tracked in the TDVAA but not present in TDMS for Labrador includes: ATV'ing, biking, bird watching, canoeing, caving, climbing, diving/snorkeling, flightseeing, horseback-riding, photography, rafting RV tours, scenic tours, snowboarding, zip lines.

Figure 11: Trip Activities for Newfoundland and Non-Resident Visitors to Labrador



There are 12 businesses that offer a range of activities from skiing to dogsledding, snowmobiling and northern expeditions, but the vast majority of companies are outfitters servicing the angling enthusiast, so additional data was gathered to provide a better level of understanding about these assets.

Table 35: Types of Companies Outfitters

Outfitters	# of Companies (42 total)	Percentage
Market ready product for consumer sales	40	95%
Private camp/property by invitation	2	5%
Significant Infrastructure	42	100%
Temporary Camps (minimum infrastructure)	1	2%

Table 36: Characteristics of the Activity Based Companies

Activity Based Companies Characteristics	# Of Assets	% Of Assets	Price Range
Program Length			
1 hour programs (or less)	3	25%	$15 - $100
2 – 3 hour programs	4	33%	$15 - $100
Half Day programs	5	42%	$15 - $130
Full Day activities	5	42%	$100 - $750
2 – 3 day excursions	4	33%	$399 - $7,094
4 – 7 day excursions	3	25%	$1,695 - $11,000
8 – 10 day excursions	0	--	--
11 – 14 day excursions	0	--	--
Program Dynamics			
Single site-based activity	1	8%	
Multi-destination based activity	6	50%	
Guided	8	67%	
Self-discovery	4	33%	
Experience Dynamics (Answered to the best of the data collectors' ability)			
Educational	6	50%	
Physical	7	58%	
Social	7	58%	
Spiritual	6	50%	
Connects you to the place	6	50%	
Connects you to the people	5	42%	
Connects you to the culture	3	25%	
Engages the senses	7	58%	
Interactive/hands-on engagement	7	58%	
Unique to Newfoundland & Labrador	4	43%	
Behind-the-scenes experience	3	25%	
Skill			
No skill required (e.g. never kayaked)	7	58%	
Some skill required (e.g. paddled a few times, know a bit about kayaking)	7	58%	
Highly skilled requirements (e.g. certified/experienced kayaker).	4	33%	

Availability			
Sell direct to travellers	7	58%	
Packaged Independent Travel options	1	8%	
Group Travel Options	1	8%	

Table 37: Characteristics of all the Outfitter Assets of the 42 Companies

Angling/Outfitters	**# Of Visitor Opportunities**	**Seasonality (INFORMATION NOT PROVIDED FOR ALL ASSETS)**		
		% Year Round	% 6 month + operation	% High season only
Total Number of Companies (42) **Number of Locations (assets = 55)**	**N = 55**	**13%**	**2%**	**73%**

Angling Outfitters	**# Of Assets**	**% Of Assets**	**Price Range**
Program Length			
1 hour programs (or less)	0	--	--
2 – 3 hour programs	0	--	--
Half Day programs	0	--	--
Full Day activities	5	9%	$250-$750
2 – 3 day excursions	3	5%	Not provided
4 – 7 day excursions	26	47%	$2,300 - $4,800
8 – 10 day excursions	1	2%	Not provided
11 – 14 day excursions	0	--	--
Program Dynamics			
Single site-based activity	0		
Multi-destination based activity	3	5%	
Guided	34	62%	
Self-discovery	3	5%	
Experience Dynamics (Answered to the best of their ability)			
Educational	0		
Physical	34	62%	
Social	34	62%	
Spiritual	34	62%	

Angling Outfitters	# Of Assets	% Of Assets	Price Range
Connects you to the place	34	62%	
Connects you to the people	4	7%	
Connects you to the culture	4	7%	
Engages the senses	34	62%	
Interactive/hands-on engagement	34	62%	
Unique to Newfoundland & Labrador	0		
Behind-the-scenes experience	0		
Skill			
No skill required (e.g. never kayaked)	35	64%	
Some skill required (e.g. paddled a few times, know a bit about kayaking)	35	64%	
Highly skilled requirements (e.g. certified/experienced kayaker).	24	44%	
Availability			
Sell direct to travellers	33	60	
Packaged Independent Travel options	0	0%	
Group Travel Options	0	0%	

Key Findings

- Twenty-four different visitor activities are made available to guests through 12 activity-based companies and 42 outfitters (40 consumer market ready, 2 private sales only);
- There are a wide variety of niche activity based operators/opportunities aligned with growing segments of the visitor market however they may not be being utilized to attract new non-resident travellers (Additional types of activity based companies tracked in the TDVAA but not present in TDMS for Labrador includes: ATVing, biking, bird watching, canoeing, caving, climbing, diving/snorkeling, sightseeing, horseback-riding, photography, rafting RV tours, scenic tours, snowboarding, zip lines.);
- Angling represents the majority of the capacity in this category and is limited to fly-in operations and not easily accessible for the peak-season sightseeing touring traveller;
- Real-time accurate data is woefully lacking, specifically as it relates to outfitters sector, so insights on price point is limited to a few companies which indicate a weekly rate of between of $5000 to $7000 per person per week;
- There appears to be a disconnect between Labrador based outfitters, the NLOA, TCR and DL in terms of fully leveraging the opportunities associated with the angler target market;
- Outfitters seem unwilling to adapt to changes in the marketplace and insist on developing and marketing their services in traditional ways;
- TCR seems willing to assist operators, however, they would like to do so in partnership with the NLOA;
- The NLOA, if it is the go to organization to support and promote angling and hunting in the province, is underfunded to do an adequate job;
- Labrador based outfitters are not supportive of the NLOA; and

- There are any number of public outfitters (who sell to the general public) and private outfitters (who make their services available to a limited clientele), this creates confusion in the marketplace and puts outfitters at odds with one another and limits their ability to collaborate to compete.

Implications/Considerations

- Destination Labrador presently has no capacity to work with angling outfitters, however, this is a missed opportunity as the region offers some of the most spectacular angling opportunities in the world and is missing out on using this asset to increase tourism visitation; and
- A concentrated effort should be made to better understand the issues and opportunities surrounding the angling opportunity in the hopes that those involved can better work together in the future.

PEOPLE/PROGRAM BASED TOURISM BUSINESSES

PB1: The destination has people/program-based businesses with experiential providers contributing to the visitor experience in the Destination. [NO]

PB2: The destination hosts a number of regularly offered festivals and special events in the Destination. [YES]

PB3: Festivals and special events that are offered on a regular basis (e.g. annually) bring critical acclaim to in the Destination. [YES]

Table 38: Destination's Program Based Companies

Program Based Companies	# of Companies	Seasonality			# with critical acclaim		
		% Year Round	% 6 month + operatio	% high season only	Provincial	National	Inter-national
Storytellers	2	100%	-	-	0	0	0
Artisans (Crafts, Quilters, Painters)	4	100%	-	-	0	0	0
Domestic Tour Operators	2	100%	-	-	0	0	0

Note: Additional types of activity based companies tracked in the TDVAA but not present in TDMS for Labrador includes: Boutique guiding companies, learning vacation, paid musicians, destination management companies, and receptive tour operators.

Table 39: Festivals and Event Statistics for the Destination

Total Number of Festival & Events	**50**	**Length**			
		% 1-day	**% 2-3 day**	**% 4-7 days**	**% 1 week +**
Community/recreation event	45	42%	29%	16%	2%
Realistic tourism draw from 80km – NL residents	18	50%	28%	11%	6%
Realistic tourism draw from 80km non NL visitors	20	45%	25%	20%	5%

Table 40: Types of Festivals and Events in Labrador

Types of Festivals Events	**# Of Events**	**# Of Attendees**
Community Celebrations	40	Data unavailable
Cultural Experience	7	Data unavailable
Historical/Cultural Experience	7	Data unavailable
Music	11	Data unavailable
Performing Arts	4	Data unavailable
Sports and Recreation	13	1,750 +
Winter	9	700+

Table 41: Festivals and Events with Critical Acclaim

Festivals/Events With Acclaim	**Provincially**	**Nationally**	**Internationally**
Cain's Quest Snowmobile Endurance Race & the Trapline Marathon	2	2	0
Labrador Winter Games	1	0	0

Key Findings

- Festivals and special events currently provide the greatest way for visitors to connect with communities, the people and culture. From mega events such as Cain's Quest Snowmobile Race to the Labrador West Regatta to the Makkovik Trout Festival these events can attract between 100 and 1800 people;
- The majority of festivals are community/recreational events (90%), 36% attract residents within 80 km, and 40% can draw non-resident visitation;
- Community celebrations are the most common type (44%), followed by sports and recreation (14%), music (12%) and winter events (10%);

- Volunteer and accommodation capacity limits the potential to grow events;
- There are very few tour operators. Tour Labrador serves the south coast, NG Solutions the north coast, plus the cruise lines that experience providers can package with; and
- There are very few experience providers in Labrador, despite investments in training. Reasons for this include: limited visitor volumes, insurance, few tour operators to work with, lack of understanding on how the industry works, and not realizing the value individual storytellers, artisans and locals bring to the visitor experience. The one exception is Base Camp near Torngat Mountain National Park that immerses guests with local Inuit guides and does so to a caliber that they are the only recognized Canadian Signature Experience in Labrador recognized and marketed internationally by the Canadian Tourism Commission.

Implications/Considerations

- There are few storytellers, yet most people have a story to share and are willing to do so. Cultivating this talent in a way that respects a person yet creates to revenue should be developed; and
- Experience providers and programs that connect visitors to the locals and their way of life, and festivals all contribute to the quality and memorability of the visitor experience. They represent opportunities to charge program fees and often link to additional retail sales associated with the experience. This is an underdeveloped opportunity in Labrador and should be developed and leveraged in sharing the stories of the people and place.

Tourism Demand Generators/Seasonality and Visitation Motivators

DG1: The destination has iconic tourism demand generators that are the primary reason for visiting Newfoundland and Labrador for domestic and international travellers. [YES]

DG2: The destination has secondary demand generators that, in combination with other tourism/community assets, motivate people to visit the destination. It contributes to the appeal but is not the primary reason to visit. [YES]

NOTE: The demand generation is as subjective assessment, grounded in data on trip motivations, visitation stats, critical acclaim, conventional wisdom, and suggestions by staff.

Table 42: Seasonality

Type	Open Year Round	High Season Only (Jun – Sep)	Open Year Round
Culture-Heritage Assets	45%	50%	5%
Nature-Based Assets	50%	29%	14%
Activity-Based Businesses	25%	50%	25%
Trails-Routes	33%	63%	15%
Outfitters	17%	74%	--
Man-made Attractions	--	50%	50%
Retail	70%	9%	22%
Restaurants	97%	3%	--

Table 43: Destination's Primary Tourism Demand Generators

Demand Generators - Primary	Community/Location
Battle Harbour National Historic District of Canada	Battle Harbour
Torngat Mountains National Park	Northern Labrador
Torngat Mountains Base Camp & Research Station	Northern Labrador
Red Bay National Historic Site of Canada	Red Bay
Cain's Quest Snowmobile Endurance Race	Labrador City
Various Outfitting Lodges	

Table 44: Destination's Secondary Demand Generators

Demand Generators - Secondary	Community/Location
Point Amour Lighthouse Provincial Historic Site	L'Anse-Amour
Eagle River Salmon Fishing	Eagle River
Labrador Coastal Drive	Western to Central/East Labrador
Hebron National Historic Site	North Coast

Key Findings

- Labrador's primary demand generators are located along the Labrador Coastal Drive and in Nunatsiavut with Cain's Quest stretching across the vast landscape. Each one of them reaches different markets with their experience to be the primary reason to visit Labrador;
- Combined with the secondary demand generators that complement a visit once a traveller has arrived in the region, the mix of adventure, nature and culture offers variety; and
- 59% of non[64] -resident travellers and 23% Newfoundlanders visit National Historic Sites while in Labrador which is also aligned with the iconic demand generators.

Implications/Considerations

- Labrador has an opportunity to build on its icons, which currently have the strongest visitor experience and can draw national and international attention to the destination, and drive visitation to all regions. As getting to these places requires a journey – developing the capacity of businesses and communities along the travel route is essential to ensure visitor satisfaction is met and/or surpassed on the entire journey and not just at the iconic sites;
- DL and its partner organizations must have a long tourism development lens, tourism development is not a sprint but more a marathon in the context of Labrador, small wins

64 Government of Newfoundland & Labrador. (2012, Jan.). *Labrador travel survey Final Report 2011.* Pgs. 33-34. A study conducted by MarketQuest Omnifacts Research for the Department of Tourism, Culture and Recreation. Note: It is cautioned that due to the nature of the study, these findings cannot be generalized.

are important and all involved must be encouraged to stay the course focusing on things already in play and embracing the long term opportunities presented through the TDVAA process; and

- The future addition of the Mealy Mountains National Park and the opening of the Torngâsok Cultural Centre in Nain will be added to this list and also become core attractors to the region in time. Ensuring the activities, people and programs of all new sites is quickly developed, along with increased opportunities at Red Bay NHS, is paramount.

4.2.4 Sustainability Dimension

4. This section provides a high-level assessment of Labrador's ability to thrive into the future by having in place plans and programs that contribute to the destination's long-term sustainability.		
Resource Base	Human Resources Sales & Marketing Environnemental Economics Social/Cultural	Essential resource investments to sustain a viable tourism business and destination into the future.

Human Resources

HR1: There is sufficient labour pool to accommodate current and projected visitation levels. [NO]

HR2: The Labrador Region is promoting tourism as a viable career option. [NO]

HR3: Where labour pool constraints are occurring in the Labrador Region there is evidence of plans or strategies to address this challenge? [NO]

HR4: There is evidence the Labrador Region is making investments in tourism industry training and tourism business development within the last five years (2008 – 2013). [YES]

HR5: There is evidence in the Labrador Region of succession planning for tourism businesses. [NO]

Table 45: Full-time Tourism Jobs in NL

Full Time Jobs[65]	2010	2015	2020	2025
Transportation	3,512	3,618	3,643	3,604
Accommodation	3,284	3,391	3,524	3,602
Food and Beverage Services	10,032	10,536	11,039	11,211
Recreation and Entertainment	1,701	1,731	1,800	1,844
Travel Services	410	422	419	404
Total Tourism Labour Demand (NL)	18,939	19,689	20,425	20,664

Key Findings

- To achieve the growth outlined in Vision 2020, and meet the evolving needs of travellers, the tourism sector needs more skilled, knowledgeable staff and operator/superior training, especially in Labrador. People and communities must reach a common understanding of what tourism is and how it contributes as one element of healthy communities. The value of tourism goes beyond the economic indicators. Investing in people will bring increased benefits and higher levels of service to guests, enhancing their overall tourism experience;
- While labour statistics are not specific to the Labrador Region the following provincial information is worth considering. According to the CTHRC[66]
    a. Tourism industries provides nearly 18,000 fulltime jobs in NL (Table 45); 8.5% of provincial economy;
    b. Spending on tourism goods / services projected to increase to $3.8 billion by 2030;
    c. Increases in labour demand are present to a point of exceeding labour supply, the gap represents 3,553 full-year jobs left unfilled;
    d. Labour shortages will result in reduced levels of customer service, operating hours, consolidation, delayed investments;
    e. By increasing the rate of employment of entry-level occupations by just 1% per year over 10 years, there is potential to alleviate a significant portion of projected labour shortages;
    f. Well-designed training generates significant returns and compares favorably with other forms of investment; and
    g. Consumers agree that lodging properties with formal employee training provide a higher quality of service (83%) and better value for money (67%);
- Training is offered through; DL, HNL, Bonavista Institute for Cultural Tourism, College of North Atlantic program. Program examples include:
    a. Community Capacity Building Workshops with contracted support from IBRD $5,000 per each workshop;
    b. Coop Basics Fall 2012; and
    c. Strategic Planning Spring 2013;
- A new BR&E project was launched in late March 2013. IBRD began a process to address and identify market readiness and quality assurance challenges within Labrador's tourism

[65] Hendry, Jennifer (2012, Mar.). *Attracting and Retaining Tourism Talent*, *Current Labour Issues and Future Challenges.* A CTDHR research presentation prepared for the HNL Board of Directors Meeting.

[66] Ibid. Slides, 4, 11, 16 and 18.

operations. DL recruited 13 partners in this initial project. Additional BR&E market readiness projects may follow involving additional operators if there are common areas of concern identified once the final first round BR&E report is finalized;

- Several recommendations pertained to enhancing the health of the businesses that participated, which if acted upon, will generate positive outcomes and benefits for the businesses as well as the Labrador region;
- Areas of common areas opportunity and concern related to market readiness emerged with multiple businesses within the region (beyond those who participated in round one)/ There are several activities taking place to discuss succession planning including:
    a. HNL Succession Planning Workshop/Webinars
    b. IBRD Training Sessions
    c. Community Development Organization sessions;
- The tourism sector has a poor reputation for training, likely due to high turnover;
- Training is under-valued vis-à-vis expansion or other capital investments;
- Training is not realizing its full potential – lots of workshops but less evidence of implementation; and
- Need to invest in developing apprentice programs/coaching programs to ensure much needed capacities such as arts and crafts are passed on to younger generations and their knowledge of how to optimized the commercial benefits is realized.

Implications/Considerations

HNL, in partnership with government and industry sector associations, has a role to play in understanding labour issues and putting proactive strategies in place to address the situation, consideration should be given to:

- Increasing the attractiveness of tourism jobs for employees in traditional labour pools by profiling those who work in the industry and are fulfilled doing what they're doing;
- Promoting tourism as a viable career;
- Encourage more businesses to participate in another round of BR&E assessment and training;
- Encouraging business/education partnerships (Canadian Academy of Travel & Tourism, co-op/internship programs, work exchange opportunities); and
- Recruiting employees from new labour pools like mature and disabled workers.

The NL Labour Market Division of the Department of Human Resources has introduced a number of initiatives to address the labour situation. HNL, in partnership with government and industry sector associations should consider understanding, partnering, and leveraging these initiatives as appropriate for the benefit of the tourism sector. In the *Maximizing Opportunities: Current and Planned Initiatives*[67] document there is a list of recommendations that includes but is not limited to the following:

- Maximizing Opportunities: Current and Planned Initiatives;[68]
- Releasing *Opportunity and Growth: An Immigration Strategy for Newfoundland and Labrador*;
- Releasing *All the Skills to Succeed*;
- Opening a network of 14 Career Work Centres across the province;
- Devolving the CA/NL Labour Market Development Agreement ;
- Releasing "Creating a Province of Choice: A Youth Retention and Attraction Strategy for Newfoundland and Labrador;
- Launching www.JOBSinNL.ca;

[67] Newfoundland and Labrador Labour Market: Outlook 2020, April 25, 2012 Labour Market Division, Department of Human Resources, Labour and Employment.

[68] Ibid.

- Launching www.NLHRmanager.ca ;
- Launching SMARTFORCE NL ;
- Introducing a new Apprenticeship Wage Subsidy program;
- Developing and maintaining strong partnerships and
- Industry training must continue and equipping operators to be their best is important for sustainability of the tourism industry, therefore, tourism leaders must continue to deliver relevant training and equipping for operators and staff.

SALES AND MARKETING PRACTICES

SM1: There is evidence that the Labrador Region’s tourism businesses are selling through multiple channels based on their website communications. [ALMOST]

SM2: The Labrador Region’s tourism business’s online sales are extended at the regional or provincial level, beyond what individual businesses are investing in, that is there are opportunities for businesses to use regional or provincial booking engines. [NO]

SM3: The Labrador Region contributes to a favorable market presence through its iconic and primary demand generators. (e.g. are the attractions that drive visitation are being used to market the province). [YES]

SM4: The Labrador Region invests/participates in activities that drive targeted market segments for their tourism business. [YES]

SM5: The Labrador Region has tour operators that package and sell the Destination domestically. [YES]

SM6: The Labrador Region has tour operators that package and sell the Destination internationally. [YES]

SM7: There is market demand for the range of tourism offerings that the Labrador Region is offering. [ALMOST]

Table 46: Tour Operators Serving Labrador

Primary Domestic Tour Operators	Primary International Tour Operators
• Adventure Canada • Atlantic Tours • Maxxim Vacations • McCarthy's Party • Groupe Voyages Quebec • Wildland Adventures • NG Solutions • Groupe Voyages Quebec • Hamilton Tours • Senior Tours • Tour Labrador • Hanover Holidays	• Collette Vacations • Canadvac Travel Services • Nature Trek • Canadream • Franklin & Frobisher • Fresh Tracks Canada • Siel Canada • Windows on the Wild
Secondary Domestic Tour Operators	**Secondary International Tour**
• Anderson Vacations • Group Travel Options (Tour Operators) • Miki Enterprises Inc. • Denure Tours • Canadian Tours International • Islander RV • Nord Expe • Linkum Tours • Wells Gray Tours • Vision the Atlantic • Toundra Voyages Inc. • Routes to Learning Canada • Nagel Toura • Wanderbird Cruises • Rotel • Labrador Wild North Expeditions • Arctic Kingdom Marine Expeditions Inc.	• Elderhostel Road Scholar • Jonview Canada Inc. • CanUSA Touristik • CanadaXperience • America Unlimited • Bridge & Wickers

Key Findings

- The regions tourism businesses are showing promise when it comes to utilizing multiple distribution and sales channels and online tools to book business. A small percentage of businesses are using their web presence to book business and many are working with tour operators;
- Several of Labrador's iconic tourism demand generators are used to promote travel to and within the province. In particular, images of its natural beauty and stunning landscapes are utilized to reinforce the Newfoundland and Labrador brand;
- The region's marketing efforts are designed to drive visitation from targeted market segments. Utilizing the regions online presence specifically the destination web site and social media channels do this. The region also attends targeted trade, media and consumer shows. (Rendezvous Canada, Atlantic Canada Showcase, GoMedia, and Canada Media Marketplace); and
- While the range of tourism experiences is growing the destination needs to continue to focus on developing compelling tourism experiences in line with the positive destination perception that are present in the marketplace. Its "bucket list" features and experiences will intrigue many but providing purchasable experiences is essential to developing sustainable tourism growth.

Implications/Considerations

- Labrador's presence on the provincial tourism website (newfoundlandandlarador.com) is impressive providing potential guests with an excellent overview of the region. The provincial site comes up as the number one listing in a Google search for Labrador tourism, however, the next site on the list is the Labrador North Chamber of Commerce, which is solely focused on tourism, while the DL website is not on the first or second page of Google, Yahoo and BING listings for Labrador Tourism – DL should consider improving its search engine optimization;
- There currently is a Labrador TripAdvisor page. It has minimal reviews, however, the reviews that are there are very positive especially for the key attractions. What's interesting is that upon investigation, this TripAdvisor account has not been opened by DL. Currently DL has plans to maximize TripAdvisor, however, they will need to identify who opened the existing account before they proceed;
- Labrador has a presence on Facebook, however, with 782 "Likes" there are opportunities to do more with this social media site (July 12/2013 Likes 315, Oct.12, 2013 Likes 471, March 13, 2013 Likes 670, May 25, 2014 Likes782);
- Consumer / Trade Shows / FAM trips are a core component of DL's activities. Ongoing review of each of these tactics is essential as consumer behaviour changes over time and what once was an effective tactic may not be as effective today (i.e. consumer shows); and
- There are 16 Labrador specific packages on NL.com at present and an additional 6 Multi- region (Western) packages (Eastern region has only 10 packages listed), packages show good variety and price points, however, most are in excess of $1000. As such, DL is encouraged to explore more moderately priced packages to attract a wider variety of visitors.

Environmental/Social Practices

ESP 1: There is evidence in the Destination of the use of environmentally responsible practices, relative to tourism (e.g. pro-active land-use planning, waste management, use of alternative technologies, energy/water conservation). [ALMOST]

EPS2: There are monitoring programs in the Destination that track the impact of human use on the assets. [NO]

ESP3: There are monitoring programs that track the environmental impact of tourism. [NO]

ESP4: There is evidence the local people, industry associations and groups engage in activities and events that attract visitors (e.g. heritage board, volunteer guides). [YES]

Key Findings

Anecdotally, it is understood the management of Labrador's fragile environment is critical and we know such management is taking place at a variety of levels. There is however, little documented information that supports any underlying strategy within the region. That being said, certain initiatives have high scrutiny such as:

- The Red Bay NHS UNESCO designation Visitor Experience Master Plan Committee has an archeologist who is taking a pro-active approach in ensuring the asset management relative to the visitor opportunities is considered together. Additionally, UNESCO mandates high standards of social and environmental policy controls for the site and surrounding area that must be maintained for designated sites, including ensuring there is a long range strategy in place to manage the valuable heritage assets;
- Parks Canada maintains high standards related to the ecological integrity and land management issues of their sites; this is evident in the policies developed for the Torngats National Park and is an element of the Mealy Mountain National Park designation application process; and
- The significant number of internationally recognized archeological sites identified in Labrador. NG is proactively engaging of the archeology branch with tourism developments to ensure the location selection, asset protection and management of the social, cultural and natural assets are identified and protection place policies are in place.

Opportunities to better leverage the cruise industry and visitors' desire to explore the coastal communities have been done in close partnership with the peoples of these communities in order to respect and protect and not exploit their cultural and environmental significance.

Strategic Planning & Investment

SPI1: Tourism is recognized as an objective in long-term planning documents, strategies and plans in the Labrador Region. [YES]

SPI2: The Labrador Region has a current strategy in place to guide their investments and product development activities. [ALMOST]

SPI3: The Labrador Region has a current marketing plan in place to guide their investments and promotional activities. [YES]

SPI4: In the past five years, capital has invested in facility renewal, expansion or development in the Labrador Region. [YES]

SPI5: In the past five years, capital has been invested in product and experience development in the Labrador Region. [YES]

SPI6: The majority tourism businesses can survive without government funding. [NO]

Founded in 1992, Destination Labrador Inc. is a well-established Destination Management Organization based in Happy Valley-Goose Bay, NL. As a partnership-based tourism industry association, DL represents a diverse tourism sector with substantial public and private investments in recreational fishing, adventure cruises, outdoor adventure and site-seeing tourism product sectors.

DL's mandate is to support business/organization partners, tour operators, receptive tourism operators, travel media, and Labrador tourism stakeholders through partnership-based initiatives that fosters growth of a viable and sustainable world-class travel destination. Supporting industry stakeholders through partnership marketing programs and, capacity building initiatives such as training, product development DL is also an advocate for responsible community tourism development in Labrador.

The Board of DL is comprised of regional representatives from all four major regions of Labrador (North, West, Central, and Straits/South).

The following results were extracted, verbatim, from the Destination Labrador 2011/12 Annual Report dated May 2012:

Expected Results[69]

"Contract project deliverables include the further development of the organizational capacity of Destination Labrador, including specific corporate activities and administration, marketing tactics such (website and social media development, FAM tours, attendance at tradeshows), research and tourism product development initiatives such as market readiness and professional development of the Labrador tourism industry. Specific project deliverables include:

Organizational Capacity

- Newsletters distributed;
- The number of newsletter subscribers;
- The number of Best Practices Missions attended;
- The number of training workshops conducted; and
- The number of stakeholders participating in the training initiatives.

Marketing Tactics

- The number of tourism operators engaged and investing in marketing initiatives;
- The amount of media coverage generated;
- The website click-through rate;
- The number of private and public sector partnerships established and resources leveraged through these partnerships;
- The number of inquiries at Destination Labrador;
- The number of non-resident visitors to Labrador; and
- Total tourism revenues and expenditures in Labrador.

Product/Destination Development

- The number of new tourism operators established; and
- New tourism product developed.

Key Findings

- At the macro level, the story of Labrador, its unique differences and historical evolution between the north, south, east and western regions was reported as not being sold in such a way that visitors realize the potential and reality of visiting the north, south, east or western regions of Labrador. The Big Land is treated as one massive geographical entity, which, for driving non-resident visitation, people does not understand the geography and the reality of distance and the vastness of the region. For this reason DL needs to leverage whatever tools they can to reinforce Labrador experiences and the unique traveller journey that is possible, albeit not in the same way as other parts of the province;
- DL and its operators must leverage investments made by TCR and Parks Canada by taking advantage of photo and video shoots to access rights-free collateral for

[69] Destination Labrador 2011/12 Annual Report, May 2012

promotional activities;
- Tourism has a dominant place in the plans and activities of regional and municipal stakeholders, most have business or marketing plans that are supported through public and private investment;
- Marketing, in one way shape or form, is central to the sub-regional plans and there appears to be minimal attention directed at tourism destination or product development;
- Private and public sub-regional partners invest in cooperative marketing and development opportunities offered by DL;
- DL produces annual business and marketing plans that are approved by its Board of Directors:
- DL undertakes limited traditional tourism advertising on its own to attract the leisure market, it works primarily in partnership with TCR in this regard. They participate, with and on-behalf of their stakeholders, in select consumer and trade shows and use strategies that target the travel trade and travel media, TCR provides input into these plans and its Board of Directors approves these strategies annually;
- DL has invested in training to assist operators in understanding ways to invest in product development to enhance guest's experiences and drive increased levels of visitation;
- Operators within the region benefit greatly from public investment and leverage opportunities to secure government funding to support and supplement their operations. This is required in order to sustain the operation of many businesses within the region; and
- A number of factors are impacting the sustainability of private tourism operators within the region, many of whom are in survival mode with several having already closed thus eliminating valuable tourism assets (attractions and infrastructure).

Implications/Considerations

- Capacity building, within the Labradorean context, will be key to ensure future sustainability of the tourism industry within the region, growing visitor levels in the primary season should be an area of focus for all involved;
- Partnerships with the Western Region and its tourism stakeholders must continue, with Red Bay NHS UNESCO designation focus must be directed at leveraging the sister UNESCO sites within the Western Region in order to stimulate increased levels of traffic to Labrador and specifically Red Bay;
- Attention must be directed at better understanding the impacts of the growth in mining, and energy sectors and the implications this is having on availability of roofed commercial accommodations for the tourism market;
- Proactive strategies need to be implemented to ensure a viable and sustainable private sector tourism industry, for example the BR&E initiative that began in 2013 must continue and involve more businesses going into the future;
- Investments in the development of the Trans Labrador Highway must continue with understanding and emphasis on servicing the needs of tourist as well as commercial traffic, therefore infrastructure to support safe and reliable travel of leisure travellers must be considered if this asset is to be leveraged for the benefit of tourism stakeholders, (VIC, WIFI stops, enhanced visitor signage etc.);
- Better leveraging the availability of the Northern Rangers service and schedule is required. This represents an opportunity to attract more visitors who have a desire to explore Labrador and the many outpost communities on the eastern shore;
- Attention must be directed at developing the outfitter sector, particularly for fishing, to ensure operators have knowledge of the changing dynamic of the tourism marketplace related to their offering, they must understand that they are in the tourism business (some do not recognize this);
- While there may be "issues" related to the effectiveness and value of the outfitters organization (NLOA) for operators within Labrador steps must be taken to establish more positive working relationships between the organization, TCR, DL and Labrador

operators in order to maximize potential growth strategies for all involved;
- There is an opportunity to have a multi-regional outfitter strategy (Labrador, Western, Central) in order to fully leverage angling and hunting assets and opportunities available in all regions, ideally in partnership with TCR and NLOA; and
- Review the marketing, alignment and provincial/regional DMO support for outfitters in other Canadian to better understand how others are working together that could lead to a stronger future for this important sector in Newfoundland and Labrador.

4.2.5 Measures of Success

5. Measures of Success Dimensions		
Key Performance Indicators	Success Measures	Specific, measurable indicators of success against which to benchmark.

KPI1: The commercial accommodations base in the Labrador Region has average year-round occupancy (62.3%, 2013) par or above the provincial average of 52.2% (2013). [YES]

KPI2: The Labrador Region offers year-round tourism opportunities for guests. [ALMOST]

KPI3: Occupancy from commercial accommodations is spread throughout the year in the Destination. [YES]

Tracking tourism performance can vary by destination, be it on a national, provincial, regional or local level depending on the available data and the frequency it is collected. In Newfoundland and Labrador the TCR Research department routinely gathers a number of tourism statistics but availability to provide regional and sub-regional results is limited by sample size and budgets. Therefore this section captures and measures those areas of performance where reliable regional stats are available. Refer to the Tourism Barometer (Section 4.1) a broader snapshot of Labrador's tourism performance using a number of other performance indicators.

Table 47: Occupancy for Economic Zones 1 to 5 (Labrador)

Year	Room Nights Available	Room Nights Sold	Occupancy Rate	Room Revenue	RevPar	ADR
2013	223,363	139,107	62.28%	$17,845,177.65	$79.89	$128.28
2012	234,271	134,902	57.58%	$15,687,861.78	$66.96	$116.29
2011	236,753	126,409	53.39%	$13,036,524.85	$55.06	$103.13
2010	225,060	123,328	54.80%	$12,506,965.08	$55.57	$101.41
2009	223,532	100,507	44.96%	$9,881,924.01	$44.21	$98.32
2013 by Quarter						
Q1	53,690	30,332	56.64%	3,767,672	$70.34	$124.22
Q2	55,504	30,650	55.16%	3,771,912	$67.89	$123.15
Q3	57,536	41,441	72.10%	5,229,946	$91.04	$126.08
Q4	56,633	36,684	64.77%	5,075,647	$89.64	$137.80
Year	223,363	139,107	62.28%	$17,845,177.65	$79.89	$128.28

Source; Accommodation Module; TDMS. Data provided by the Department of TCR on 26 Feb 2014.

Table 48: Provincial Occupancy

Year	Room Nights Available	Room Nights Sold	Occupancy Rate	Room Revenue	ADR	RevPar
2013	2,547,332	1,329,570	52.19%	$170,549,307.22	$66.95	$128.27
2012	2,686,552	1,347,795	50.17%	$163,098,122.33	$60.71	$121.01
2011	2,649,742	1,343,028	50.69%	$155,282,408.96	$58.60	$115.62
2010	2,649,164	1,327,522	50.11%	$147,906,026.18	$55.83	$111.42
2009	2,611,960	1,256,846	48.12%	$135,546,144.76	$51.89	$107.85
2013 by Quarter						
Q1	593,524	245,921	41.48%	28,866,788	$48.70	$117.37
Q2	665,152	333,174	49.83%	42,258,771	$62.96	$125.73
Q3	701,953	478,136	67.89%	64,257,730	$91.27	$134.48
Q4	586,703	272,339	46.16%	35,166,018	$59.51	$128.02
Year	2,547,332	1,329,570	52.19%	$170,549,307.22	$66.95	$128.27

Source; Accommodation Module; TDMS. Data as of 26 Feb 2014. Compiled using reports found at http://www.tcr.gov.nl.ca/tcr/stats/

Key Findings

- Labrador has experienced steady growth in all aspects of roofed accommodation performance, realizing increases annually in the key performance metrics of Occupancy, Revenue Per Available Room and Average Daily Rate as noted in Table 48;
- At 62% Labrador's 2013 roofed accommodation occupancy was 10% higher than the provincial occupancy rate of 52%;

- In 2013 the average daily room rate increased in the Avalon region (+5%), Eastern (+3%), Central (+5%), Western (+5%) and **Labrador (+10%).”**[70] Anecdotally, growth in the Labrador rates has been described by stakeholders as being attributable to growth in the mining and energy sectors but there is no statistical evidence to confirm whether this is true or not;
- The annual travel/ occupancy does not however demonstrate conclusively that there are “year-round tourism opportunities” in the region as most certainly a portion of this annual travel and occupancy relates to those visiting the region for business purposes; and
- As noted in Table 48 travel to Labrador occurs throughout the calendar year, occupancy varies by quarter from a high of 72.1% in Q3 (Prov. 67.9%) to a low of 55.1% in Q2 (Prov. 41.4%). The swing in occupancy Q3 to Q2 = 17% (Prov. = 26.5%) and demonstrates that higher volumes of travel occurs throughout the year compared to the provincial occupancy.

Implications/Considerations

- The provincial data on Labrador’s commercial accommodations reveals operators are in an enviable position for RevPar and occupancy, compared to other regions in the province (Tables 47 & 48);
- Of concern, is the lack of insight regarding to “who is staying in these rooms?” Until it is known if there is growth in the resource industry, diminishing the visitor accommodation inventory, or if it is heresy, it is difficult to track the impact or know where to invest. Further research is required;
- Given the limited number of roofed accommodations/rooms and the higher than average occupancy related to business travel the inventory of available rooms for tourists, especially during the peak travel season, is reduced therefore potentially restricting growth in tourism related travel;
- Consideration should be given to establishing a clearer understanding of the dynamics facing Labrador’s accommodation sector in order that proactive solutions can be identified to grow the number of accommodation options available for tourists; this could include growing the number of RV and campground sites throughout the region; and
- The potential to gather a targeted number of regional statistics – such as resident and non-resident travel by season, should be explored provincially, as it is not possible with the Statistics Canada sample size, yet is a critical variable for measuring inter and intra provincial travel, as well as the international visitation.

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[70] Ibid, pg. 3

5. Implementation Plan

What Does Implementation Look Like in Labrador?

The true value of a Destination Development Planning process and the subsequent document produced is only realized when proactive and timely implementation takes place and all key stakeholders begin to see results.

Ensuring a realistic implementation plan is developed and adopted for Labrador's TDVAA is critical for tourism operators, funding partners, and government entities that support tourism development. It will be this collaboration that takes action towards the implementation of immediate short-term opportunities and begin to forecast for the longer-term activities.

The scope of the consultants' responsibilities for the TDVAA process in Labrador concludes with providing development recommendations and implementation guidelines. This is the second regional TDVAA project completed (following the initial pilot project in the Eastern Region, the remaining three regions will complete their projects through spring of 2015) and following the Eastern pilot, an HNL, IBRD, TCR, ACOA and DMO led implementation strategy has been identified and is underway. That process is called Opportunity Management (OM) and is being spearheaded by IBRD and will be used to help prioritize longer-term recommendations in the context of a proactive implementation strategy.

Head Start Implementation

Implementation of short-term actionable recommendations, the "low hanging fruit" opportunities, can begin at once. These recommendations have been flagged or designated in the report with a symbol. These recommendations have also been flagged by responsibility and at the conclusion of this section a chart clearly outlines each opportunity and the organization responsible for implementation.

The logical next step for implementing the remaining recommendations is to work through the OM process with key stakeholders to prioritize these recommendations. Led by the NL Tourism Board, all parties involved in Labrador's TDVAA process with the resulting recommendations can then understand and plan for the impact on their individual work-plans, program funds, budgets and staff resources required in order to implement the identified recommendations.

The NL Tourism Board is ultimately accountable for creating and overseeing a manageable and realistic implementation plan, facilitating implementation, supporting and monitoring the process, and evaluating progress related to contribution and achievement of the *Vision 2020* goals.

Understanding the Opportunity Management (OM) Process

OM is a dynamic process that leads to tangible outcomes with ongoing evaluation, from idea generation to initiative completion. It is not a module or event, rather it is a disciplined process, focused on generating results over the short and long term.

Benefits and Outcomes:

- Sets long and short-term priorities;
- Identifies a means to use financial, technical & human resources wisely;
- Guides the strategic focus of staff and volunteer efforts towards tangible goals;
- Helps identify when to stop pursuing an idea and move on to the next one; and
- Provides a solid foundation to communicate priorities to stakeholders and helps manage expectations.

The OM Process - *Doing the Right Things & Doing Them Right*

Figure 13 illustrates the funnel with the stages and gates TDVAA recommendations will be examined through to get approval and buy-in to implementation.

The process involves the following steps:

Phase 1 – Opportunity Identification (E.g. Review of the TDVAA Recommendations)

Phase 2 – Recognizing Opportunities (E.g. Prioritizing mid-term and long-term projects)

- Initial Screening
- Secondary Assessment (Matrix)
- Balanced Approach Criteria

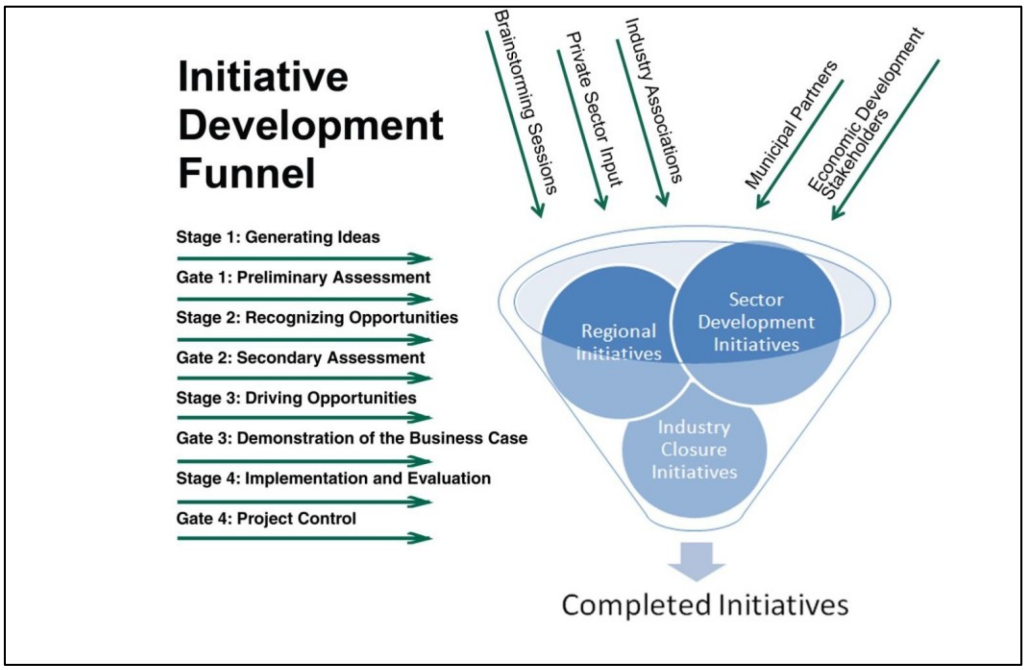
Phase 3 – Driving Opportunities

- Assigning leads, accountability, action plans and project management

Phase 4 – Monitoring & Evaluation

- Advance, Rework or Kill?

Figure 13 OM Initiative Development Funnel - sample



At each gate of the process, the merit of each recommendation is examined to determine its merit for resource allocation. Decision criteria are the factors used to help determine the likelihood of successful implementation. These should be established up front, be weighted (%), assign points (1-5) using a predetermined scoring system with weights and points that are determined by identified participants at the outset. Each idea and the ensuing strategies and tactics must pass through a gate, there are three options at each gate: (1) Advance; (2) Rework; or (3) Kill.

ADVANCING IMPLEMENTATION

Under the leadership of the NL Tourism Board, the DL Board, Labrador TDVAA Advisory Committee, HNL, TCR, IBRD, ACOA and tourism operators all have a role to play in various implementation activities to ensure implementation is successful. Some recommendations principally impact government partners, others are operator specific and many require a collective effort by private, public and not-for-profit partners. Tourism succeeds when collaboration trumps self-interest, funding partners support priority initiatives, training support is provided when needed, and realistic time frames are set to achieve outcomes. Done well, the collective competitiveness and appeal of the destination will increase generating benefits for tourism businesses and communities. Table 54 proposes a launch sequence for consideration.

Table 49 TDVAA Implementation Launch

Task	Detail	Timing	Resp.
NL Tourism Board, HNL Board, TCR, DL approves/adopts/ accepts the study and its recommendations	HNL/TCR to facilitate the approval process The management team presents the study to the Boards, TCR, ACOA, IBRD for acceptance, approval and adoption	July-Aug Mtgs./ Presentations	HNL, TCR, DL
Head start recommendation implementation begins spearheaded by those identified as responsible for each recommendation	Recommendations marked with a symbol are considered ready for implementation, those identified can begin acting on these recommendations at once	Sept	Operators, DL, HNL, IBRD, ACOA, TCR
IBRD spearheads the OM process to prioritize the long-term recommendations	IBRD facilitates a prioritization process with the TCR, ACOA, HNL, DL, and Advisory Committee. NL Tourism Board is accountable for implementation; keep them in the loop	Sept - Dec	IBRD, HNL, DL, TCR, Tourism Board Mgr.
Reconsideration of budgets	Given that they would have been set in fall 2013	Oct - Dec	HNL, DL, TCR, ACOA, IBRD
Formalize Implementation Process For Province/HNL/Others	Develops implementation plan for high priority recommendations to be implemented by those other than operators as indicated through the OM process	Oct – On going	IBRD, ACOA, HNL, TCR, DL
Provincial/HNL Others Implementation	Develop list of implementation plans and deliverables with accountability to the Tourism Board	Dec	HNL, TCR, DL
Round One Implementation Roll Out	Monitor implementation activity, report quarterly on progress to Tourism Board, develop Labrador destination development report card to track activity and progress	Winter 2015	HNL, TCR, DL
Destination Development Advocacy	Where advocacy is required to affect destination development implementation plans develop specific recommendation advocacy strategies	On-going	HNL

Implementation Task Teams

In most cases, the majority of recommendations specific to DL and its operators will be implemented by an *Implementation Task Team.* For example, the report recommends the development experience corridors over the next decade. The benefactors (businesses/communities) who have a direct connection to the recommendation become the implementation task team and be comprised of individuals who have expertise, experience, interest in this recommendation and are the most likely proponents to act on and benefit from the work.

DL would facilitate the formation of the implementation task team and the development of a process with the team. Specific strategies, timelines, deliverables and accountabilities will be set by the team. When necessary the team, through DL would draw in resources to aid in the steps of implementation.

Prioritizing the Recommendations with Roles and Responsibilities

Getting a Head Start on Action While Priorities & Budgets Get Set

This report identifies a series of actionable activities designed to make a positive contribution to the appeal of Labrador in the immediate term, as well as over the long-term. They have been identified throughout Chapter 3 by the symbol: This was included to assist with planning and getting a head start on short-term actions, the *"low hanging fruit",* while the longer term ones are discussed in the context of OM.

The chart details suggestions for a number of items that can begin immediately. They are organized by Finding. Note: in some cases the recommendation has been edited for brevity, see full recommendation in the report.

Table 34: Head Start Recommendations That Can Begin Immediately

Finding	Action
1	**TCR, ACOA, IBRD, HNL:** Work with other government departments to secure the funding to ensure that investments that have started in basic services along the TLH include the needs of the visitor journey.
2	**TCR, IDO, NT, Parks Canada & Local Area Businesses:** Establish a Northern Coastal Visitor Experience Taskforce, comprised of businesses and government agencies that see benefits in developing the visitor potential of these four visitor journey routes to plan the phased development for enhancing the visitor experience. **DL with Operators:** Examine individual contributions to the experience categories and how individual businesses could contribute. **Parks Canada, DL & the Western DMO:** Strike South Coast Experience Taskforce of businesses who want to introduce new tourism experiences to market. **TN, NG & Parks Canada:** The second priority is for the North Coast. Embedded in the 2014 – 2020 Nunatsiavut Tourism Strategy refresh are two product development projects, one focused on developing the Artisan Network, the second an Experience Provider Network.
3	**DL, TN, IBRD, TCR & Municipal Councils:** Host information sessions in communities that want tourism as an economic driver.
4	**DL, TCR, HNL, ACOA, IBRD, Parks Canada, NG Community Councils:** Support the new tourism strategy and ensure the developments for the north coast occur in partnership and collaboration with the Nunatsiavut Government (NG) and Tourism Nunatsiavut (TN).
5	**TCR**, **CTC, DL, Parks Canada & Western DMO & NG:** Meet to determine the degree of access to the EQ visitor profile information that can be shared on projects that impact the core assets of the Western

	Field Unit. **TCR:** Review the current research available to determine if customer profiles for Labrador (resident and non-resident travellers) could be produced.
6	**TCR, DL, IBRD, Parks Canada, NG & CTC:** TCR to organize a co-sponsored, two-part FAM trip in 2015 for the individuals collectively responsible for planning and marketing Labrador, NG and the Western DMO.
7	**NG & IBRD & NL Craft Council:** Investigate funding the development of a not-for-profit network that would coordinate the business interests of the visual and performing arts community to support the collective purchasing power, marketing, product development and training requirements. **NG:** Investigate the potential for encompassing the development of the Experience Provider Network within the roles and responsibilities of the Nunatsiavut Tourism staff.
8	**TCR & NLOA:** Take the lead to get the appropriate participants at the table to figure out new and refreshed proactive solutions to leverage the high end angling market and facilitate positive and proactive strategies to leverage the important angler market for Labrador's outfitters. **TCR, DL, NLOA and Operators:** Determine if there is merit in profiling one element - Trophy Brook Trout – as the Labrador unique selling proposition (USP) for the region. **DL & NLOA:** Take on a proactive role in helping Labrador outfitters understand how to move beyond 'listings' to effectively convey the experience differentiation, enhancing the calls-to-action, and closing the sale relative to today's consumer expectations. **TCR & DL:** Review the filters in TDMS to ensure that private outfitters are not listed on marketing communications.
9	**DL, TCR (Recreation) & Municipalities:** Add the sports and recreation events to the TDVAA database to get a more holistic sense of the scope of winter activities taking place in Labrador that are not captured in TDMS.
10	**DL, IBRD, TN & TCR:** Discuss the array of new visitor serving options being used in different jurisdictions to identify ones that would provide the best visitor experience for a rural northern traveller and develop a concrete list of options to be explored as the TLH is being completed and the paved highway from Happy Valley-Goose Bay to Red Bay is advanced.
11	**Operators:** The low hanging fruit is for operators to audit their websites in 2014 and ensure the basic, expected elements are there - most importantly mobile friendly, a clear call-to-action, and a Google map link, an ability to talk to a person year-round and make a reservation. **DL & NL:** Continue to invest in two destination websites: (www.onlylabrador.com) and NG's (www.tourismnunatsiavut.com). **Operators:** Invest in high-definition images that portray the emotional and physical connection - the people, places, and ways the guest can engage. **IBRD, HNL, TCR, ACOA, TN & DL:** Ensure operators are aware of the existing programs that would assist them in creating a basic professional mobile friendly and responsive website or a more affordable internally produced WordPress or equivalent site.
12	**TCR and the Restaurant Association of NL:** Meet to discuss how the databases could be integrated, or at a minimum, review the variables in the E-dining databases with the TCR research team to ensure the nuances important to travellers are captured.
13	**Tourism Board:** Consider broadening Goal 4.3 within Vision 2020 from being a leader in environmental sustainability, to one that acknowledges the three core elements of sustainability: people, planet and profits. **DL & NG:** Take a leadership role in recommending that operators and TCR adopt the 2005 TIAC/Parks Canada Canada's Code of Ethics and Guidelines for Sustainable Tourism, which HNL adopted in 2006 or identify if there are newer philosophies in the market that would be of greater value.

	Operators: Incorporate educational elements and sustainable businesses practices into their activities and programs in ways that create appreciation, understanding and a deep emotional motivation to experience new people, cultures, and place.[71] **NG:** The new Tourism Strategy includes a recommendation to formally adopt the practice of proactively engaging archeologists at the product concept stage to compliment standard environmental assessment practices; an advisable approach for other Labrador tourism developments.
14	None
15	**TCR:** Conduct a special purpose study on accommodations to determine the impact of the resource industry on the availability of rooms.
16	**TCR & RANL:** Meet to discuss how the databases could be integrated, or at a minimum, review the variables in the E-dining databases with the TCR research team to ensure the nuances important to travellers are captured. **TCR:** As the discussions continue regarding the updating of the TDMS system, the following issues and opportunities were identified in Labrador that should be factored in to the discussions.
17	**Tourism Board:** Consider amending five *Vision 2020* goal statements as follows

71 Government of Newfoundland and Labrador (2009). *Uncommon Potential: A Vision for Newfoundland and Labrador Tourism.*

Appendices

Appendix 1: Contributing Stakeholders

The following individuals contributed to the TDVAA process for the Labrador Region.

Project Sponsor

Contracted the TDVAA and assumed overall management and budget responsibility for the project. They provided the link between the project manager and the organization's management or Board of Directors. Appointed staff were:

- Carol-Ann Gilliard, Chief Executive Officer, Hospitality Newfoundland and Labrador;
- Lynn Taylor, NL Tourism Board Manager, NL Tourism Board; and
- Scott Andrews, Manager Strategic Tourism Product Development, Department of Tourism, Culture and Recreation, Government of Newfoundland and Labrador.

Project Manager and Assessment Team

Designed and led the process working closely with Project Sponsors, Data Collection Team, and the Regional Destination Project Lead. Contracted through an RFP was:

- Dr. Nancy Arsenault, Managing Partner, Tourism Cafe Canada; and
- Richard Innes, President and Carolyn O'Donnell, Senior Consultant of Brain Trust Marketing & Communications.

Regional Destination Project Lead

Oversaw the destination-based activities related to the Volunteer Steering Committee and the Data Collection Team. This ensured engagement and understanding of the project at the field level and served as a catalyst for facilitating and supporting the implementation of the recommendations in partnership with TCR and HNL. Destination Labrador tandem team was:

- Randy Letto, Executive Director, Destination Labrador
- Keith Small, Business Development Manager, Destination Labrador

Project Steering Committee

Provided input and feedback to the Project Sponsor at critical stages of project development and implementation. The committee is comprised of organizations responsible for leadership and implementation of tourism development activities at a regional level, as well as the various government partners involved in the project. Members included:

- Hospitality Newfoundland and Labrador, Carol Ann Gilliard, CEO
- NL Tourism Board, Lynn Taylor, NL Tourism Board Manager
- TCR, Scott Andrews, Manager Strategic Tourism Product Development, Chris Tuck, Tourism Product Development Officer
- IBRD, Dion Sheppard, Regional Economic Planning Analyst
- ACOA, Betty Rumboldt, Account Manager Community Economic Development
- Eastern DMO, Kathi Stacey, Executive Director
- Adventure Central, Shannon Pinsent, Executive Director
- Western DMO, Mark Lamswood, Executive Director
- Destination Labrador, Randy Letto, Executive Director
- Destination St. John's, Cathy Duke, CEO, Rhonda Hutton, Director of Marketing

The TDVAA Advisory Committee (Industry Working Group)

The TDVAA Advisory Committee (Table x) was comprised of tourism business owners/operators, experience providers, and destination management staff. Their role was to oversee the execution of the TDVAA process. They provided the local voices and perspectives important to the validation process, findings and ultimate recommendations.

Table 50 TDVAA Labrador Committee Members

Name	Company	Category	Region
Edward Burke	Labrador Adventure & Outfitting	Accommodations, DL Board, RV/Park	West
Toby Leon		DL Board	West
Nancy Blundon	Labrador West Chamber of Commerce	Associations, Tourism Partner, Non-profit	West
Peyton Barrett	Experience Labrador Tours	Tour Operator, Arts & Crafts, Boating	South
Margaret Burden	Alexis Hotel	Accommodations	South
Barbara & Cyril Campbell	Campbell's B&B / Campbell Restaurant & Bakery	Accommodations	South
Bonnie Goudie	Point Amour Lighthouse Historical Site	Attraction, Non-Profit Events	South
Carmen Hancock	Tour Labrador	Tour Operator, Hiking, DL Board Chair	South
Dwight Lethbridge	Pratt Falls Salmon Lodge Ltd.	Outfitter, DL Board, Boating, Accommodations	South
Chad Letto	Northern Light Inn	Accommodations, DL Board, RV/Park, Snowmobile Club	South
Gudird Hutchings	Battle Harbour Historic Trust	Attractions, Non-Profit, Outfitter, Attractions, Boating	South
Gary Baikie	Parks Canada	Tourism Partner, Park	North
Wayne Broomfield	NG Solutions	Tour Operator, DL Board, Park, Boating, Remote Camp	North
Dave Lough & Jillian Larkham	Nunatsiavut Government	Government, Park, Arts & Crafts Attractions, Northern Ranger	North
Herb Brown	Birches Gallery	Arts & Crafts, Events, Shopping	North
Jack Cooper	Cooper's Minipi Camps	Outfitter, DL Board, Event	Central
Peyton Sterling	Labrador North Chamber of Commerce	Associations, Tourism Partner, Non-Profit	Central
Judy Hillier	Hotel North	Accommodations	Central
Phillip Earle	Air Labrador	Transportation	All
Keith Small & Monica Surina	Destination Labrador	DL Board	All
Mark Lamswood	Go Western Newfoundland	Associations, Tourism Board, Tourism Partner, Non-Profit	Newfoundland

Trudy Taylor-Walsh	Parks Canada	Government, Tourism Partner	Newfoundland

Data Collection Team

Data collectors were responsible for gathering all secondary information (e.g. Community reports, research, and strategies) as well as the primary information related to specific information required for the appraisal process. Members were:

- Scott Andrews, TCR
- Jackie Harnum, TCR
- Krista Noseworthy, VIC Counsellor
- Melissa Samms, Student, St. John’s
- Anita Keefe, VIC Supervisor
- Randy Letto, DL
- Keith Small, DL
- Dave Lough, NG
- Jillian Larkham, NG

Appendix 2: Glossary of Terms

Source of most definitions: *Department of Tourism, Culture and Recreation (TCR), and the Tourism Industry Association of Canada (TIAC).*

Accommodations: A facility licensed under the Tourist Establishment Regulations Act that provides overnight accommodations for remuneration. (TCR).

ADR: A standard accommodation performance metric calculated for the average daily rate for accommodations: calculated by revenue divided by rooms sold. ADR is used in the NL statistical reporting. (TCR).

Art gallery: A gallery for the display of artistic works as defined by the Department of Tourism, Culture and Recreation. (TCR).

Attraction (tourism): Means a physical site or event with the primary function or ability to attract a traveller by providing experience of a recreational, educational, scientific, or entertainment nature, based on cultural and natural heritage resources or recreational facilities and services, but does not include a shopping center or a recreational and an entertainment establishment which is commonly found in or near most urban areas that offer limited tourist attractions, including a bowling alley, cinema, sports field or an arena. (TCR).

Attraction (local tourism): Means an attraction or business that generates a limited number of travellers that serves mostly the local customer base. The attraction is listed in the Tourism Destination Management System database of the Department of Tourism, Culture and Recreation. (TCR).

Attraction (major tourism): A business, facility or site whose primary purpose is attracting and satisfying the needs of travellers of which the majority resides outside of the general area. The attraction is listed in of the Department of Tourism, Culture and Recreation. (TCR).

Business: Owns and operates one or more tourism assets that may be purchased and marketed independently or together (e.g. Terra Nova Resort and Golf Community or the East Coast Trail).

Community festival: A special occasion sponsored or sanctioned by a Province, Federal, Municipal government or organization for a definitive time period. (TCR).

Community welcome sign: Means an advance sign installed by a community with one sign in each direction not more than 2km from the community. (TCR).

Confirmatory sign: A follow-up sign used as a supplement to enhance directional information with other approved tourist oriented directional signs such as fingerboards, and/or panel board signs. These cannot be used independently. (TCR).

Craft shop: A premise whose principal use is the sale or display of crafts produced in the Province, as defined by the Department of Innovation, Trade and Rural Development. The craft shop is listed in the Tourism Destination Management System database of the Department of Tourism, Culture and Recreation. (TCR).

Designated hiking/walking trails: A hiking/walking trail that is recognized by the Department of Tourism, Culture and Recreation as a travel generator that is maintained and monitored by a group or organization. (TCR).

Eating establishment: A building or part of a building designed or intended to be used or occupied for the purpose of serving the general public with meals and refreshments at individual tables or booths with a minimum seating capacity of ten persons inside the establishment. (TCR).

Farm and fish markets: A seasonal retail establishment for the exclusive sale of agricultural or fishery products produced in the Province and includes U-pick operations and fish-out ponds. The primary purpose is the sale of local produce and other foodstuffs, rather than the retail sale of goods or other services. This category does not include greenhouses, garden centres, flower shops or similar establishments. (TCR).

Local road: A street that is primarily used to gain access to the property bordering it.

Major highway: Highway routes #1, 2, 3, and any route number ending in 0 or 5. (TCR).

Museum: A premises used for the display of Provincial and other artifacts, and includes an archaeological site, as approved by the Department of Tourism, Culture and Recreation. The museum is listed in the Tourism Destination Management System database of the Department of Tourism, Culture and Recreation. (TCR).

Outfitter: Hunting and fishing businesses that package and supply visitors with a range of services from guides, to meals, and accommodations so that they may enjoy the outdoors.

Primary demand generator: Are iconic places, attractions, and activities that are 'main reason' domestic and international travellers decides to a destination (e.g. To visit Base Camp in Labrador, or Gros Morne National Park in the western region). They have distinct competitive positioning and visitor appeal, and by their nature attract travellers who then bring business to many other community and tourism businesses.

Non-resident tourist: A traveller from outside of a particular region, bringing new expenditures into the region. A non- resident tourist in Newfoundland and Labrador is coming from another part of Canada or another place in the world. (TCR).

Resident tourist: A traveller from within the province, who generates revenue through activity and travels to an attraction or destination within the province. A resident tourist does not bring new revenues into the province, but does use goods and services. (TCR).

Return on investment (ROI): Primarily, measurable positive economic impacts, including contribution to Gross Domestic Product (GDP) from the Tourism Industry, as well as higher employment levels, greater income earned by the tourism workforce and tax revenue to all levels of government. Secondarily, ROI considers community impacts, multiplier effects and business impacts. (TCR).

REVPAR: A standard accommodation performance metric calculated as: Room revenue divided by rooms available. (TCR).

Secondary demand generator: Are places, attractions, activities, and experience that a visitor chooses to enjoy once at the destination (e.g. attending a performance, enjoying a special local area tour). They are a complement the vacation but not the main reason for the visit.

Theme park: A development whose primary function is the provision of amusement facilities and the attraction of the public into selected areas of the Province and includes golf courses, skiing operations, recreational resorts, walking or hiking trails and amusement parks with a minimum of three attractions. The theme park is listed in the TDMS database. (TCR).

Tourism: The definition of tourism follows that adopted by the World Tourism Organization and the United Nations Statistical Commission: "the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes". (TIAC).

Tourism assets: Individual guest opportunities that are marketed and purchasable, or packaged for a visitor to enjoy (e.g. 1 of 17 Trails of the East Coast Trail). It is also the unit of analysis that operators identify for their business to be categorized in the TDMS database (e.g. a resort accommodation and a golf course = two assets).

Tourism Destination Management System (TDMS): A database of tourism products and services managed by the Department of Tourism, Culture and Recreation. (TCR).

Tourism demand/spending: Is defined as the spending of Canadian and non-resident visitors on domestically produced commodities. It is the sum of tourism domestic demand and tourism exports. (TIAC).

Tourism domestic demand: Is the spending in Canada by Canadians on domestically produced commodities.

Tourism employment: A measure of employment in tourism and non-tourism industries. Tourism employment measures the number of jobs in an industry generated by, or attributable to, tourism spending on the goods and/or services produced by that industry. It is based on an estimate of jobs rather than “hours of work”. Thus, someone who works 10 hours a week counts for as much, by this measure, as someone who works 50 hours a week. (TIAC).

Tourism exports: Is the spending by foreign visitors on Canadian-produced goods and services. It includes spending that may take place outside of Canada, for instance, the purchase of an airline ticket from a Canadian international carrier, to travel to Canada. (TIAC).

Tourism gross domestic product: The unduplicated value of production, within the boundaries of a region, of goods and services purchased by tourists. In the NTI, GDP is calculated at basic prices in both current and constant dollars. Only direct GDP is calculated in the NTI. GDP is also generated indirectly in the upstream production chain of a good or service. Although these indirect effects can be linked to tourism, they are not included in tourism GDP. (TIAC).

Tour operation means a development established for the purpose of providing guided tours in areas of special interest. The tour operator is listed in the Tourism Destination Management System database of the Department of Tourism, Culture and Recreation. (TCR).

Travel payments: In the travel account are correspondingly defined to include all expenses incidental to travel abroad by residents of Canada. Among these are expenditures abroad for lodging, food, entertainment, local and intercity transportation and all other purchases of goods and services (including gifts) made by the travellers. The series thus includes any purchases of goods to be imported for personal use by travellers. Also included are medical expenses and education expenses of Canadian residents outside Canada as well as Canadian crew members’ spending in other countries. Travel payments do not include international transportation fares paid by Canadian residents to foreign carriers. (TIAC).

Travel receipts: The travel account is defined to include all expenses incidental to travel in Canada by non-residents. Among these are expenditures in Canada for lodging, food, entertainment, local and intercity transportation and all other purchases of goods and services (including gifts) made by travellers. The series thus includes any purchases of personal goods to be exported by travellers. Medical expenses and education expenses of non-residents in Canada as well as foreign crew members' spending in the country are also included. Travel receipts exclude international transportation fares paid by non-resident travellers to Canadian carriers. (TIAC).

Visitor economy: Encompasses everything that attracts visitors to a destination; everything that make a place special, distinctive and capable of engendering pride and interest and a place worth experiencing.

A successful visitor economy requires managing all of the components in an integrated and long-term way, with a clear focus on the needs of the visitors the destination is seeking to attract and the destination brand.

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Appendix 4: Nunatsiavut Interviews & Stakeholder Input

The Nunatsiavut Tourism Strategy refresh project ran parallel with the Labrador TDVAA to optimize the leveraging of resources, collaborative thinking, and aligning outcomes. The ***Nunatsiavut Strategy project team*** included:

- Dave Lough, Deputy Minister for Culture, Recreation and Tourism & Director Tornsagok Cultural Centre, Nunatsiavut Government, working out of Nain
- Jillian Larkham, Experience Development Officer, Nunatsiavut Government, working out of Happy Valley
- Kristy Sheppard, Director of Tourism, Nunatsiavut Government, working out of Rigolet

The Nunatsiavut Advisory Committee played a vital role throughout the 9-month process (October 2013 - June 2014), providing valuable feedback, insights and advice to the strategic directions and tactical priorities for this plan. Special thanks are given to: Susan Nochasak, Nunatsiavut Government Ordinary member, Frances Murphy, Torngat Arts and Crafts, Gary Baikie and Jenna Andersen, Torngat Mountains National Park, Ashley Shiwak, Rigolet Inuit Community Government, Wayne Broomfield, NG Solutions, Peter Adams, President & CEO Nunatsiavut Marine, Patty Dicker, Amaguk Inn, and Randy Letto, Destination Labrador.

Additionally, 26 individuals kindly gave their time in 45 to 90 minute ***stakeholder interviews.***

- Ashley Shiwak, Tourism Manager, Town of Rigolet,
- Chantelle Andersen, Makkovik Craft Centre and Artisan,
- Colleen Kennedy, Executive Director, Gros Morne Cooperating Association,
- David Igloliorte, Facilities Manager and Heritage Interpreter, Moravian Mission Complex,
- Derrick Pottle, Fisheries and Oceans, Carver and Bear Safe Inc.,
- Dr. Heather Igloliorte, Professor, Concordia University,
- Frances Murphy, Torngat Arts & Craft Centre Manager,
- Gary Baike, Visitor Experience Manager, Torngat National Park,
- Gus Semigak, Heritage Carpenter, Hebron Church Complex,
- Jane Shiwak, Rigolet Craft Shop and Net Loft,
- James Thorbourne, President and CEO, Nunatsiavut Group of Companies,
- Jamie Brake, Archeologist, Nunatsiavut Government,
- Geoff Hancock, Field Unit Superintendent, Parks Canada Western NL Field Unit,
- Johannes Lamp, former Minister of Culture, Recreation and Tourism,
- Isabella Pain, Deputy Minister of the Nunatsiavut Secretariat,
- Malve Petersmann, Exhibits and Visitor Experience Co-ordinator, Torngâsok (Illusuak) Cultural Centre,
- Nancy Rose, Welcome Staff, Nunatsiavut Assembly Building,
- Patty Dicker, Amaguk Inn,
- Peter Adams, Head of Nunatsiavut Marine, Northern Ranger,
- Peter Deering, Resource Manager, Western NL, Parks Canada,
- Phillip Earle, CEO Labrador Air, Sandy Michelin, Sinittavik Bed & Breakfast,
- Sandra Flowers, Community Volunteer, Rigolet Heritage Society,
- Terry Rice, Makkovik Town Manager,
- Tim McNeill, Deputy Minister of Education and Economic Development,
- Vanessa George, Marketing Manager of the NL Cruise Association, and
- Wayne Broomfield, Manager, NG Solutions.

Appendix 5: Vision 2020 Alignment Summary

There are seven areas of investment with 16 goal categories in the *Vision 2020* (Table 51). The alignment of each of the 18 major findings from this study is identified in Table 52.

Table 51: *Vision 2020* Goals and Primary Objectives

Goal	1. Private Public Leadership - A Partnership for Tourism Growth & Development
1.1	Establish a private public tourism board (within 3 months).
1.2	Strengthen stakeholder communication.
1.3	Lead through best practices.
	2. Sustainable Transport Network - A Transportation Strategy to Grow Our Industry
2.1	Build strong relationships with key transportation alliances that provide access to and from our province to meet the demand for affordable, accessible, and quality transportation.
2.2	Ensure efficient and easy travel, in and around, the province.
	3. Market Intelligence & Research Strategy - A framework for Accessible & Timely Research
3.1	Develop and implement a research strategy and plan that provides industry and government with relevant and timely information and analysis.
3.2	Establish performance indicators to annually measure the success of *Vision 2020*.
	4. Product Development - Delivering Strategic & Sustainable Travel Experiences
4.1	Develop and implement an experience strategy that resonates with sophisticated travellers, reinforces our unique brand and increases our return-on-investment.
4.2	Continue to improve government-owned tourism infrastructure.
4.3	Be a visible leader of environmental sustainability.
	5. Tourism Technology - Strengthening Our Information & Communications Technology
5.1	Ensure all tourism partners and operators embrace technology as critical elements in attracting visitors and enhancing their experiences and services.
	6. Marketing Our Brand - Building on the Success of Our Creating Marketing Campaign
6.1	Continue to build a successful, differentiated tourism brand and leading tourism marketing position.
6.2	Identify and pursue new and emerging market opportunities.
6.3	Ensure there is a clear understanding of the roles and responsibilities of all stakeholders in promoting the province as a destination.
	7.Developing Our Workforce - Growing Our People for a Dynamic Industry
7.1	Instill a sense of price, encourage a spirit of hospitality, and foster a positive relationship between our industry and the communities who will help us achieve *Vision 2020*.
7.2	Focus efforts on attracting and retaining a skilled tourism workforce.

Table 52: Labrador Region's *Vision 2020* TDVAA Labrador Recommendations Alignment

Finding	*Leadership*	*Transport*	*Research*	*Product/ Experience*	*Technology*	*Marketing*	*HR*	*Core*
1	1.3	2.1, 2.2	3.1	4.1, 4.2		6.1, 6.2		
2	1.2, 1.3		3.2	4.1		6.1, 6.3	7.1	
3	1.2, 1.3			4.1		6.4	7.1	
4	1.3			4.1, 4.2, 4.3	5.1	6.1, 6.2, 6.3	7.1	
5			3.1	4.1		6.1, 6.2		
6	1.3		3.2	4.1		6.2, 6.3		
7	1.3			4.1		6.1, 6.2, 6.3		
8				4.1, 4.3	5.1	6.1	7.1	
9			3.1	4.1		6.1, 6.2		
10	1.3	2.2		4.1	5.1	6.3		
11			3.2		5.1	6.1, 6.2, 6.3	7.1	
12			3.1	4.1				
13	1.3			4.1, 4.3				
14	1.3						7.1	
15			3.1					
16			3.1					
17								X