Western

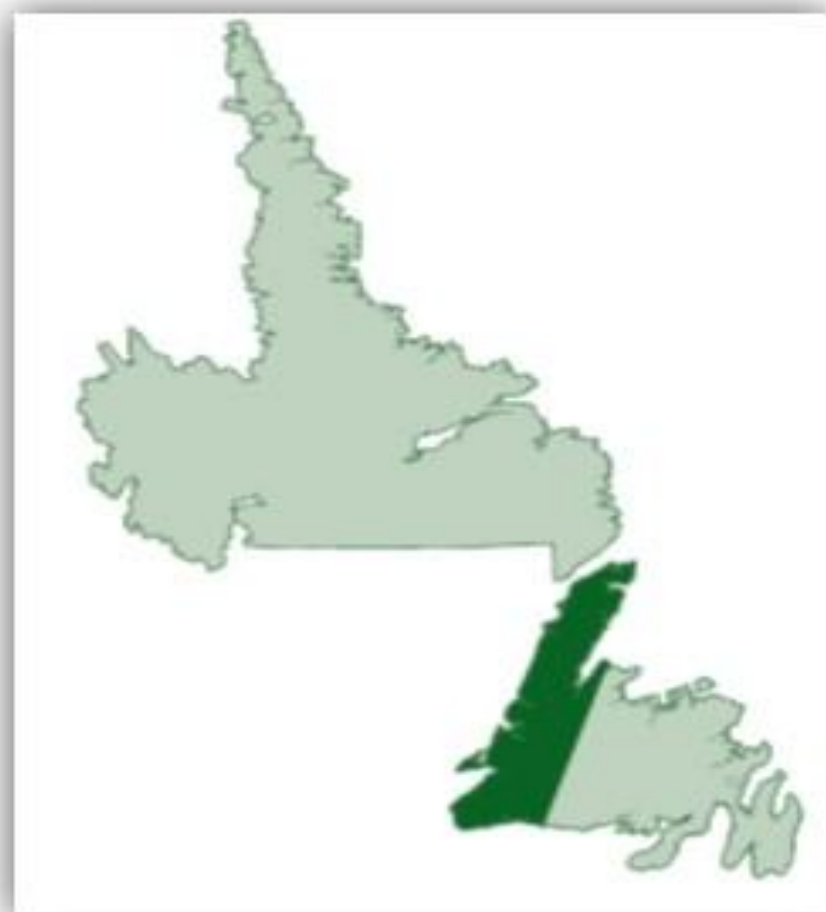
Tourism Destination Visitor Appeal

Raising the Bar

Conducted by:

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

Map of the Western Region



Executive Summary

In 2009, the tourism industry and province of Newfoundland and Labrador (NL) set forth 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 for growth in NL guided by seven strategic directions. Underpinning the vision is respect for home, residents, travellers, communities and profitability. The Western region of Newfoundland has established a reputation for being one of the strongest and most attractive tourism regions within the province.

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

Blessed with its unique stretch of coastline running alongside the Long Range Mountains this is truly a region with much to offer. Featuring two UNESCO-designated World Heritage Sites that include Gros Morne National Park and L'Anse aux Meadows National Historic Site, the region is one of the most recognized places in the country. It's no wonder thousands of visitors travel to this region annually. The Western region is considered a developed tourism destination with a large list of tourism market ready assets as well as a knowledgeable tourism industry who have, over the years, worked well together. The destination, while mature, warrants attention in certain areas to continue to draw resident and non-resident travellers alike.

Strategic Direction #4 within the *Vision 2020* document focuses on tourism 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 provincial Department of Business Tourism Culture and Rural Development (BTCRD) and The Atlantic Canada Opportunities Agency (ACOA) commissioned a customized Tourism Destination Visitor Appeal Appraisal (TDVAA) to be completed in each region. Led by Brain Trust Marketing and Communications and the Tourism Café Canada, the project team included representatives from HNL, BTCRD and the Western Regional Destination Management Organization or *"Western DMO"* (WDMO).

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 travellers, reinforce the brand and increases the return on investment;
2) Continue to improve the visitor experience and visitor economy; and
3) Empower the Western region to be a visible leader of responsible, sustainable tourism.

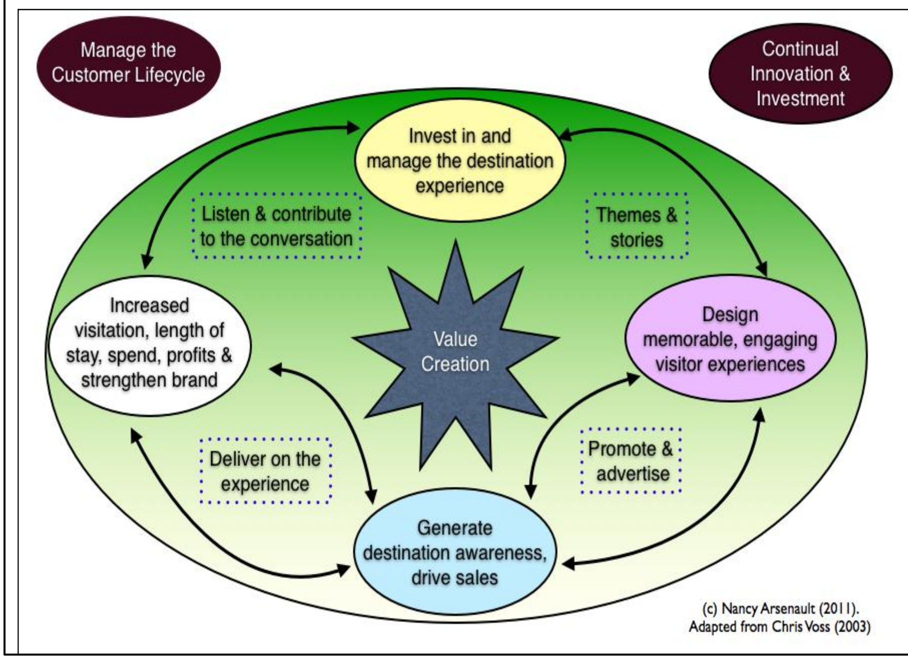
Designed to take a visitor-centric approach, this study reviewed 263 documents, reports, plans and studies, plus information from the Tourism Destination Management System (TDMS) and Restaurant Association of NL's (RANL) e-dining databases. New variables were added to the primary data collection that was supported by the WDMO, BTCRD and ACOA. This 14-month process (March 2014 to May 2015) incorporated insights from the WDMO TDVAA Advisory Committee, an online stakeholder questionnaire and community stakeholder sessions in April 2014 to launch the project, and October 2014 to present and secure input on the preliminary findings. Recommendations were developed following stakeholder input on the validated data and were reviewed by the Advisory Committee, HNL and BTCRD colleagues.

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

Figure 1: The Tourism Experience Investment Cycle



"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.

In the Western region this is critical for tourism based projects, but also for the many regional developmental initiatives that benefit people, communities and visitors alike such as enhancements to trail assets, visitor way-finding, Port of St. Barbe ferry terminal and beautification in Steady Brook and Rocky Harbour, as examples. All of these provincial initiatives will have an impact on tourism to greater or lesser degrees and have been considered in this Western 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

Twenty-one 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 through the 14 months. Each key finding, detailed in Chapter 3, is supported by tactical actions that provide the foundation for operators, WDMO, HNL, ACOA, Parks Canada Agency (PC), BTCRD and others.

Finding 1*:* The geographical diversity of projects in the pipeline defines the opportunity to strategically invest in new visitor experience development from the northern to southern tips of the Western region.

Finding 2: Developing the untold stories of the Western region into new people/program based visitor experiences could serve the Western region well in driving niche marketing into smaller communities along the coast.

Finding 3: Strengthening the visitor experience along multiple touch points of the Viking Trail will increase the appeal of the journey between the three UNESCO World Heritage Sites in the Western region and southern Labrador.

Finding 4: There is room to improve the sense of arrival and welcome at key entry points to the region and World Heritage Sites.

Finding 5: A concerted effort to grow overnight visitation to the communities within Gros Morne National Park is needed in the months of June and September.

Finding 6: Opportunities exist to expand the trails and trail networks, but such initiatives must be led by community champions who benefit from the economic spin-offs derived from attracting this customer type.

Finding 7*:* There is opportunity to better leverage the salmon angling opportunities in the Western region.

Finding 8*:* Action needs to be taken to help hoteliers drive higher revenue per available room (REVPAR).

Finding 9*:* Opportunities to strengthen and market winter tourism should be supported.

Finding 10*:* Cruise, sports, meetings and conventions represents growth market opportunities for select communities within the Western region.

Finding 11*:* Innovative visitor servicing solutions need to be found that enrich the information available on the ferries and while travelling along the west coast.

Finding 12*:* Improving the food and beverage experience in the Western region will support travellers growing interest in culinary experiences, but owners/operators face a number of challenges.

Finding 13*:* Industry stakeholders would benefit from having tourism performance data that delineates non-resident transportation and accommodation statistics by type of travel.

Finding 14: Operators expressed interest in understanding customer profiles for resident and non-resident travellers to guide their product development and marketing decisions.

Finding 15*:* Due to the increase in regions collecting a room levy from visitors, concentrated efforts must be made to ensure the tourism industry collaborates and leverages these funds effectively to grow visitation and tourism receipts.

Finding 16*:* Currently, steps are in place to monitor impact on the natural resources within the Western region, however, further industrialization and resource based development must consider the balance of environmental, economic and social impacts of the region, now and into the future.

Finding 17: The TDMS database has limitations, which if addressed, will benefit visitors, operators, and the province and assist in moving towards the achievement of goals outlined in *Vision 2020*.

Finding 18: There is an opportunity to better leverage TripAdvisor and Facebook to drive tourism visitation and revenues.

Finding 19: Festivals and events have the potential to grow tourism revenue and visitation and become primary demand generators with international, national and/or provincial acclaim.

Finding 20: Early reports on Tourism Assurance Plan (TAP) approval are raising red flags in a few sectors where compliance challenges are being identified.

Finding 21*:* 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 that can be advanced in the immediate term. 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 the Western region.

The second step is to put the recommendations through BTCRD's Opportunity Management process (OM) so that the WDMO, BTCRD, HNL, PC and ACOA, among other stakeholders 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 the opportunity. Leadership will be provided by HNL and BTCRD, with direct participation from the WDMO Board and TDVAA Advisory Committee. An annual review by HNL, BTCRD, ACOA and the WDMO 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) set forth 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 for growth in NL guided by seven strategic directions. Underpinning the vision is respect for home, residents, travellers, communities and profitability. Western Newfoundland is an established tourism destination that features Gros Morne National Park and L'Anse aux Meadows, two UNESCO World Historic Sites. The region is connected to the mainland through key ports located in Port aux Basques (Nova Scotia) and St. Barbe (Quebec and Labrador) and by air at Stephenville, Deer Lake and St. Anthony. The region enjoys notoriety and critical acclaim on many fronts and continues to welcome thousands of resident and non-resident travellers annually.

> 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 Newfoundland and Labrador (NL) brand stands for 'creativity' that is natural, spontaneous, and uncomplicated. It is an emotional brand that stands on the three pillars of - 1. The real character of the people, 2. A rich history, heritage and culture, and 3. The natural environment that enjoys 29,000 km of coastline and icons.[2] The Western region exemplifies the NL brand promise and invitation. It possesses countless examples of rich culture, heritage, natural landscapes and authentic people and experiences. However, to grow its enviable position as a leading tourism destination, operators must strive to, in the least, keep pace or ideally exceed visitor's expectations, wants and desires heading into the future.

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 the Western region that must be addressed in developing products and experiences that will generate new revenue for businesses and memorable value for guests.

The Western region boasts many tourism assets including a rich and varied heritage, spectacular natural landscapes and two UNESCO World Heritage Sites. Gros Morne National Park and L'Anse aux Meadows National Historic Site have, and continue to present, compelling reasons for visitors to make the journey to NL and are often considered to be one of the book ends of a trip to the region. These assets, in addition to airport locations in Stephenville, Deer Lake, and St. Anthony, as well as a north-south highway corridor offering ferry access to Nova Scotia and Labrador and Quebec, make travel to and within the region convenient. Coastal communities and cluster areas are nestled throughout the region, each offering their own suite of things to see and do. The region has a long list of tourism assets yet travel for the most part is concentrated in the central and to a lesser extent the northern parts of the region.

[2] NL Brand Positioning Statement. www.tcr.gov.nl.ca/tcr/tourism/tourism_marketing/newfoundland_and_labrador_brand.

The TDVAA process presents the opportunity to identify ways to increase travel to the more recognized areas as well as the areas of the region that are considered underdeveloped and underperforming from a tourism perspective. A primary goal of the process is to help those operators and communities, who have not realized the full potential of increased tourism visitation, to understand ways to enhance the offer and become more appealing. At the same time, there is opportunity to grow tourism with the iconic attractors through collaborative destination development strategies that encourage operators to leverage their strengths beyond the traditional summer travel period. There are excellent examples of collaborative tourism development in pockets of the region. Others have an opportunity to also work together more effectively in order to impact the power of partnership and collaboration.

As a leading tourism destination within the province, the industry has an opportunity to move beyond their current success and achieve increased results. With awareness of the NL Brand at an all-time high, now is not the time to coast; continued strategic tourism development will be at the core of remaining a compelling and competitive tourism region into the future.

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*[3], which is focused on product and experience development.

HNL, BTCRD, the WDMO, and Atlantic Canada Opportunities Agency (ACOA), have engaged in a formative review process to assess the Western region's appeal, identify gaps and opportunities to ensure alignment for investment and development of the destination with all 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 -management organizations in data collection and a process for engaging stakeholders at multiple touch-points through the 14-month process (March 2014 to June 2015).

Acknowledgements

The Western region is the third destination to complete the TDVAA process in NL. Special thanks are extended to project team members from the WDMO, BTCRD, ACOA and HNL, plus the Advisory Committee 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 WDMO Advisory Committee. These individuals provided the project team, representatives from the NL Tourism Board, HNL, BTCRD, WDMO, ACOA, Brain Trust and the Tourism Café, with an on-the-ground perspective at the local level.

Structure of the Report

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

Chapter 3 presents the 21 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

3 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

can begin immediately while the remaining elements are prioritized through the BTCRD-led Opportunity 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 the Western region 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 Opportunity Management process and provides a summary table of the Head-Start tactics.

Four appendices conclude the report: (1) Contributing Stakeholders, (2) Glossary of Terms, (3) Bibliography, and (4) *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"[4]

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 the Western region'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

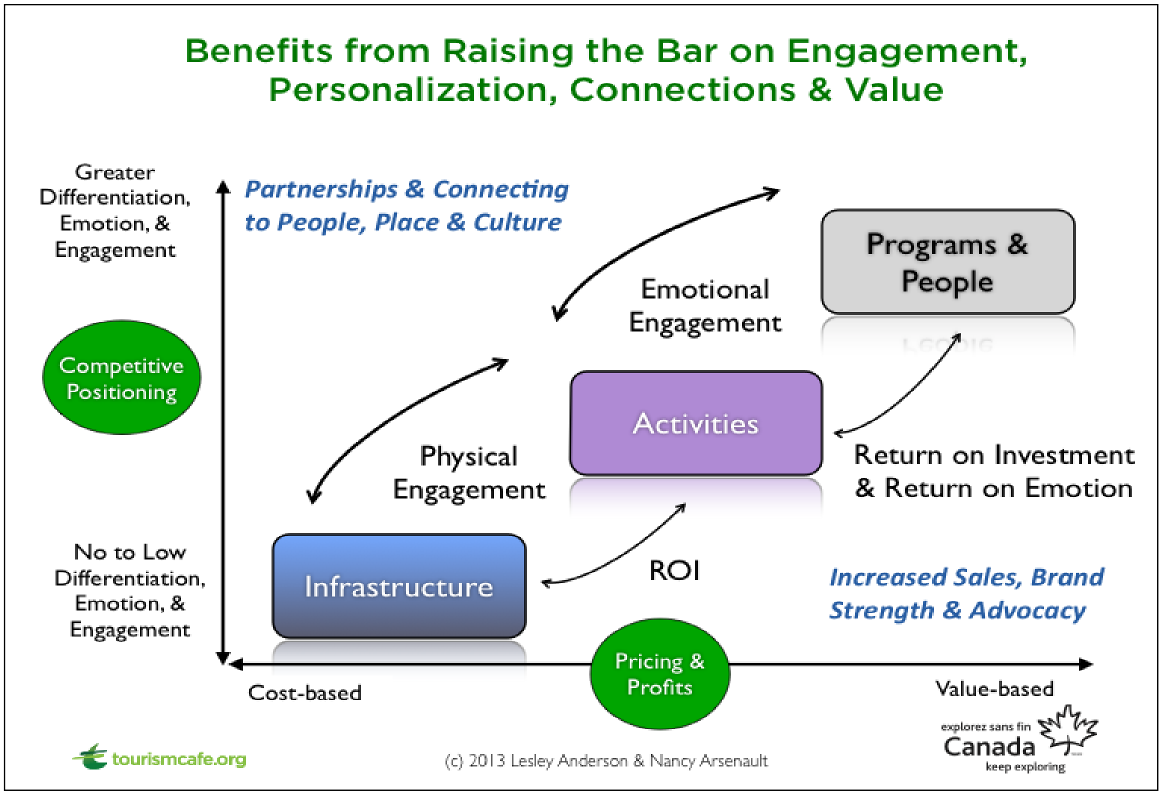
The ability to increase the benefits from the visitor economy for travellers and businesses alike can be enhanced. This is done by understanding how to raise the bar generating value that strengthens the ability to differentiate tourism products, create an emotional connection with travellers and engage 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 Western.

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

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

Figure 1: Raising the Bar on Value to the Visitor



- ***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.

> "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***

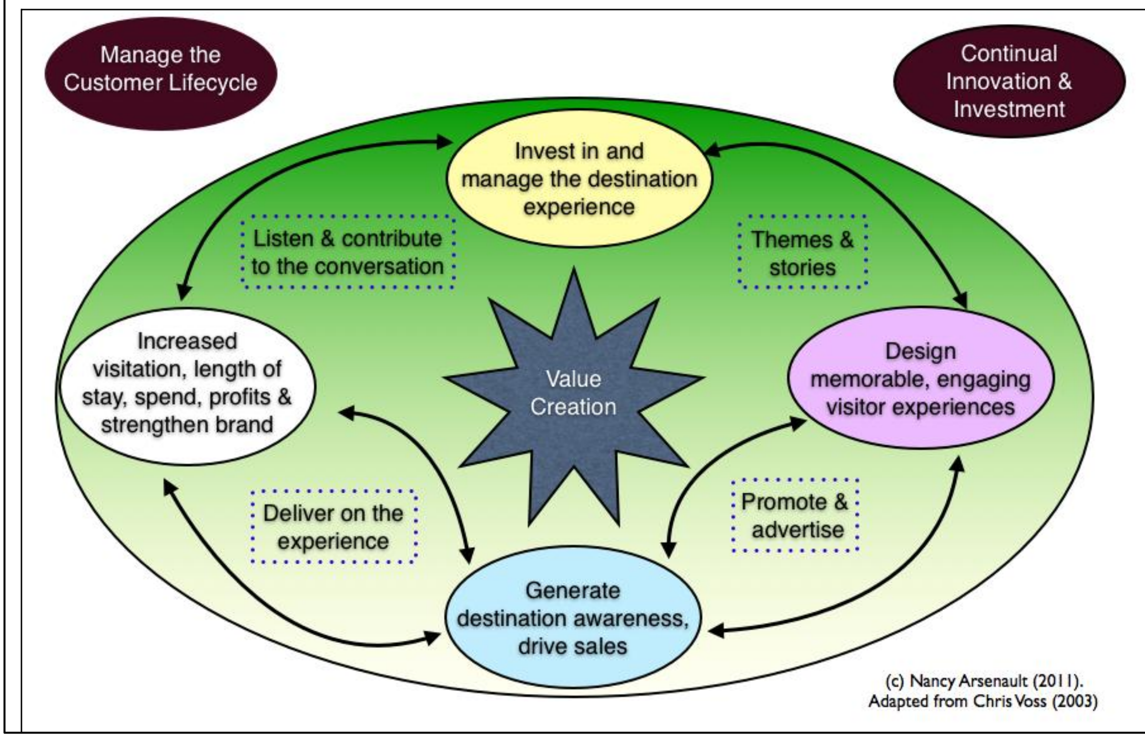
- ***Program and people based businesses/operations*** have very low or no infrastructure costs; rather they rent or pay user fees to gain access to places to stage their visitor interactions. They typically appeal to very niche markets, have a low-volume, high-yield ratio, and know their customers extremely 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:

- An understanding of the destination's 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 stakeholders to gather their insights and feedback at multiple touch-points. This ensures 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 Western region TDVAA, the touch-points included:

- Establishing a WDMO 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 BTCRD 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, WDMO and BTCRD before presenting them to the Advisory Committee and Government Representations via an online presentation;
- Preparing a draft report for WDMO, BTCRD 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, BTCRD and WDMO, along with an annotated bibliography of all references.

Data Sources

Multiple data sources informed this report: (1) 263 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) 10 face-to-face stakeholder meetings, six in April 2014, four in October 2014, numerous online meetings and presentations with the data collection team, TDVAA Advisory Committee, the project team, and special sessions with BTCRD 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.

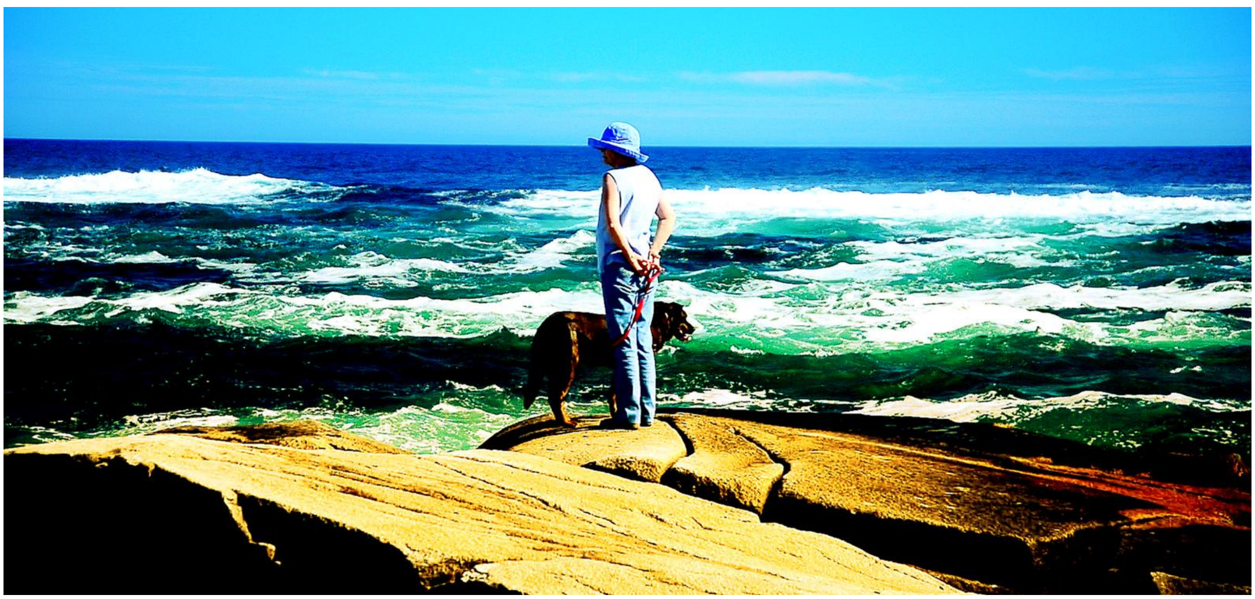
A total of 263 reports, plans and studies were reviewed at the international, national, provincial, regional and community level to inform all five dimensions. Additionally, client meetings and community-based stakeholder meetings provided facts and context to the foundation of knowledge used to produce 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 regional level for Western Newfoundland. This was not a comparative analysis of the sub-regions or individual businesses. As a result, recommendations, actions and opportunities also have a regional focus. Implementation of the recommendations will vary depending on the tourism operator or agency leading (e.g. WDMO, HNL, BTCRD 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 228 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.



Source: Western Destination Management Organization, (Photo: Rose Blanche)

3. Key Findings & Recommendations

As one of the primary tourism regions in the province that achieves high levels of annual visitation, tourism operators in the Western region have much to gain through the completion and ultimate implementation of this destination development planning process. While recognized as leaders in certain aspects of tourism development, success has been achieved in specific geographic areas of the region anchored by three UNESCO World Heritage Sites, two in the Western region and the newest designation in nearby southern Labrador. The opportunity to build on the success of these destinations and extend the tourism opportunities to other parts of the region has been made evident through the work done to date. Collaboration to these ends will be critical. The spirit of cooperation evident among the region's operators and government partners will set the stage for advancement and success.

Core to this approach is the need to consistently deliver high quality experiences that meet the needs and expectations of resident and non-resident travellers. Building these visitor experiences must leverage the core demand generators and encourage movement throughout the region by tapping into the unique charm, stories and landscapes of the individual communities that are found north to south along 700 km of scenic routes and highways. With mainland ferry access at the northern and southern tips of the region, as well as three airports situated to the southern, central and northern areas, access is not the challenge. However, without a personal vehicle or rental car travelling up and down the coast can be a challenge as ground transportation is very limited. In addition long stretches of drive time along the scenic routes exist, this could be made more interesting by offering engaging experiences throughout the journey and increasing the number of new visitor touch points.

This approach accomplishes two things. First, it delivers on the provincial brand promise by giving travellers experiences that align with the images and stories they see in the provincial advertising. Secondly, the potential to extend the length of stay of guests ensures a maximum contribution to the economies of many operators and communities.

The future sustainability and success of tourism within Western region will call on several things to fall into place. **At the heart of future success, however, will be a willingness among those who benefit from visitors to embrace the opportunities identified through the TDVAA process and proactively engage in visitor centric tourism development.**

Summary of the Key Findings

Twenty-one aggregate key findings emerged from the Western 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 WDMO, HNL, ACOA, Parks Canada and BTCRD. The data and interpretation that formed the foundation for the analysis are presented in Chapter 4.

A "Key Finding" is written as a statement of fact designed to capture the essence of an important 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. Opportunities and recommendations identified with a epresent 'Head-Start Tactics' that can begin more immediately, while the remaining elements are prioritized through the Opportunity Management (OM) process. OM is a dynamic process that leads to tangible outcomes with on-going evaluation, from idea generation to initiative completion. It is a disciplined process that is realistic about the resources available and focuses on generating results over the short and long term. The OM process is an iterative one that will need to be continually monitored and re-visited when considering destination development activities and initiatives for western Newfoundland. A more complete description of the process is found in Chapter 5.

Summary of Findings

Finding 1*:* The geographical diversity of projects in the pipeline defines the opportunity to strategically invest in new visitor experience development from the northern to southern tips of the Western region.

Finding 2: Developing the untold stories of the Western region into new people / program based visitor experiences could serve the Western region well in driving niche marketing into smaller communities along the coast.

Finding 3: Strengthening the visitor experience along multiple touch points of the Viking Trail will increase the appeal of the journey between the three UNESCO World Heritage Sites in the Western region and southern Labrador.

Finding 4: There is room to improve the sense of arrival and welcome at key entry points to the region and World Heritage Sites.

Finding 5: A concerted effort to grow overnight visitation to the communities within Gros Morne National Park is needed in the months of June and September.

Finding 6: Opportunities exist to expand the trails and trail networks, but such initiatives must be led by community champions who benefit from the economic spin-offs derived from attracting this customer type.

Finding 7*:* There is opportunity to better leverage the salmon angling opportunities in the Western region.

Finding 8*:* Action needs to be taken to help hoteliers drive higher revenue per available room (REVPAR).

Finding 9*:* Opportunities to strengthen winter tourism should be supported and marketed.

Finding 10*:* Cruise, sports, meetings and conventions represents growth market opportunities for select communities within the Western region.

Finding 11*:* Innovative visitor servicing solutions need to be found that enrich the information available on the ferries and while travelling along the west coast.

Finding 12: Improving the food and beverage experience in the Western region will support travellers growing interest in culinary experiences, but owners/operators face a number of challenges.

Finding 13*:* Industry stakeholders would benefit from having tourism performance data that delineates non-resident transportation and accommodation statistics by type of travel.

Finding 14: Operators expressed interest in understanding customer profiles for resident and non-resident travellers to guide their product development and marketing decisions.

Finding 15*:* Due to the increase in regions collecting a room levy from visitors, concentrated efforts must be made to ensure the tourism industry collaborates and leverages these funds effectively to grow visitation and tourism receipts.

Finding 16*:* Currently, steps are in place to monitor impact on the natural resources within the Western region, however, further industrialization and resource based development must consider the balance of environmental, economic and social impacts of the region, now and into the future.

Finding 17: TDMS and E-Dining databases have limitations, which if addressed, will benefit visitors, operators, and the province and assist in moving towards the achievement of goals outlined in *Vision 2020*.

Finding 18: There is an opportunity to better leverage TripAdvisor and Facebook to drive tourism visitation and revenues.

Finding 19: Festivals and events have the potential to grow tourism revenue and visitation and become primary demand generators with international, national and/or provincial acclaim.

Finding 20: Early reports on Tourism Assurance Plan (TAP) approval are raising red flags in a few sectors where compliance challenges are being identified.

Finding 21*:* Amend the five *Vision 2020* goals to optimize the investment focus needed to achieve the desired outcomes.

Western Brook Pond, Gros Morne National Park (UNESCO World Heritage Site

Finding 1: The geographical diversity of projects in the pipeline defines the opportunity to strategically invest in new visitor experience development from the northern to southern tips of the Western region.

In terms of accessible natural landscapes, the Western region offers some of the most amazing vistas to explore in the entire province. The captivating image of Western Brook Pond is but one example of the diverse and spectacular locations that are scattered from the northern to southern tips of the region.

A diverse list of projects in the pipeline[5] revealed that many communities throughout the entire Western region were keen on increasing their tourism potential through expanding the capacity of their existing tourism assets, diversifying, and further investing. In some cases, project initiatives, such as the proposed Global Geopark, represents an opportunity to build on the iconic position of Gros Morne National Park and World Heritage site by extending the visitor's journey through to the North Arm Hills, Blow-Me-Down Mountains and Lewis Hills. To the south, there are opportunities in the southwestern area and to the north, Strategic Tourism Expansion Plan (STEP) initiatives in Vinland and Gros Morne are in the process of identifying new reasons to visit these parts of the region. The Humber Valley-Bay of Islands area is equally as important to the visitor's journey and stands to benefit significantly from the opportunities and recommendations listed in the Western region's TDVAA.

Key project opportunities that emerged for development consideration through this process include ***but are not limited to:***

[5] See page 49, Chapter 4, for the projects in the pipeline identified through the TDVAA process

- Isle aux Mort's Destination Development Plan;
- Port aux Basques downtown development project;
- Rocky Harbour and Steady Brook beautification projects;
- Cultural Destination initiatives in Stephenville and Port au Port area;
- Qalipu First Nations' approach to tourism development;
- Marble Mountain developments;
- The Deer Lake snowmobile hub initiative;
- Creative Gros Morne cultural visitor experience development;
- Theatre NL Cow Head program and infrastructure expansion;
- Port of St. Barbe enhancements; and
- STEP Gros Morne and Vinland's collaborative tourism development activities.

Strategically advancing the list of projects in the pipeline will increase the diversity of the destination appeal, create new reasons to visit and encourage longer stays and repeat visitation. Ensuring priorities are placed to target different types of visitors will optimize the reach and diversity available in the Western region. Additionally, these projects will create new tourism demand generators that in turn encourages new and repeat visitation as guests discover multiple reasons to travel throughout the region and beyond the traditional travel hubs.

Opportunities / Recommendations:

1. **BTCRD, ACOA, HNL, WDMO and Operators:** Prioritize, through the Opportunity Management (OM) process, projects that: (1) have the greatest potential to attract non-resident travellers with strong consideration to those that will drive visitation to areas beyond the traditional travel hubs; and (2) give attention to the underdeveloped cultural and heritage projects found in the northern and southern tips of the region, these include projects initiated by the French Shore Historical Society, the Great Northern Peninsula Heritage Network and the Isle aux Mort's Destination Development Plan.
2. **BTCRD, ACOA, PC, Town of Rocky Harbour and the Gros Morne Cooperating Association (GMCA):** Combine the interest by the municipality to develop the Rocky Harbour waterfront with new infrastructure, ensuring plans align with the Gros Morne Cultural Blueprint, which is focused on enhancing visitor-centric experiences and activities. As a key community in GMNP, all of Rocky Harbour's plans should consider the integration of infrastructure, activities/services, and places for people/programming to occur to optimize revenue streams and create a hub of visitor appeal in the centre of town.
3. **BTCRD, ACOA, WDMO and Operators:** Encourage repeat visitation and increased length of stay through more intra-regional north-south travel by prioritizing projects that represent opportunity to "expand the traveller's journey."
4. **BTCRD, ACOA and the GMCA**: Use the GMCA's operating model; a successful catalyst for tourism development in GMNP, to stimulate additional collaborative, community based initiatives and an integrated set of visitor focused results for the entire sub-region.

This recommendation supports Goals 1.3, 4.1, 4.3 of *Vision 2020*.

Finding 2: Developing the untold stories of the Western region into new visitor experiences could serve the Western region well in driving niche markets into smaller communities along the coast.

The stories of the Vikings and the unique geology of GMNP may be two of best known stories associated with the region to resident and non-resident travellers that are leveraged to drive visitation – but there are many more stories left to be told.

Stories create a strong foundation for moving visitors, with like-interests, throughout a region and enable a number of businesses and communities to add their unique 'chapter' to the story. In many cases, this can be done using the existing infrastructure and landscapes by adding activities, people and programs to these spaces that connect visitors to the unique and authentic characteristics and culture of the local people. It is a way to personalize travel options for the visitors in ways that generates new revenue for businesses without the attachment of large capital overhead.

No longer do travellers visit a place just to see the sights. They want to dive deep, engage with locals, understand the character of the people and places they visit and most importantly gather life-long memories. The opportunity exists to learn from those who are successfully “telling their stories” by encouraging the development and creation of new story-based tourism experiences that are synonymous with the heritage and landscape found in the region. Underdeveloped stories in the Western region to consider include the Qalipu First Nations, the Stephenville military history, the Newfoundland dog (Isle aux Morts), and the impact of French and other European influences. Building experiences around these diverse and unique stories throughout the region, especially in areas that have not had the ability to bring their stories to life, will go a long way to enhance the competitiveness and appeal of each part of the region.

Opportunities / Recommendations:

1. **BTCRD and ACOA:** Prioritize the list of funding requests that benefit projects that build on the existing infrastructure and landscapes, through product development initiatives that add activities, programs, and opportunities to connect with the locals as revenue generating visitor experiences.
2. **BTCRD and ACOA:** Critically review all infrastructure funding requests to ensure they demonstrate how the layering on of story-based visitor experiences and engagement will be included to move beyond ‘look-see’ mass market/low fee tourism to those that add value and raise the bar on the visitor experience.
3. **HNL, Gros Morne Institute for Sustainable Tourism (GMIST), Bonavista Institute for Cultural Tourism (BICT) and Operators:** Develop a workshop(s) that help operators within communities along a story route to learn how to build an integrated visitor journey, based on targeted traveller types, that benefit multiple stakeholders and create an enriched guest experience. Equip operators with tools and knowledge to create and build tourism experiences and products around stories that engage, communicate and connect and reflect a lasting articulation of the communities character and culture.

This recommendation supports goals 4.1, 6.1, 6.2 and 7.1 of *Vision 2020*.

Finding 3: Strengthening the visitor experience along multiple touch points of the Viking Trail will increase the appeal of the journey between the three UNESCO World Heritage Sites in the Western region and southern Labrador.

The uniqueness and notoriety of having the Red Bay Basque Whaling Station NHS in nearby Labrador, L’Anse aux Meadows National Historic Site (NHS), and Gros Morne National Park UNESCO World Heritage Sites within and adjacent to the region represents an unparalleled opportunity to drive increased visitation, especially among non-resident travellers.

Gros Morne National Park and L’Anse aux Meadows NHS in Newfoundland and Red Bay NHS in Labrador are all World Heritage Sites (WHS) designated by UNESCO. In 2014, when Red Bay NHS received its WHS status, it brought newly deserved attention to NL. Having three internationally acclaimed sites in one geographical region represents the unique potential to strengthen the opportunities for visitors, in peak season, to travel from GMNP to Red Bay NHS, and in time as the Trans-Labrador Highway traffic increases, drive visitation from Labrador (Quebec) to the western coast.

There are three challenges in optimizing this unique opportunity:

(1) The physical journey between sites is long and the options along the way for visitors to connect with communities, secure desired accommodations, enjoy varied dining experiences and find purchasable tourism products are limited;

(2) The capacity for creating engaging visitor experiences in the communities along this 365 km journey is limited. Therefore, coordination in developing visitor offerings must be done in collaboration between communities and stakeholders along the Viking Trail and into southern Labrador; and

(3) Parks Canada's capacity to enhance personalized programming due to budget constraints, and the availability of private sector operators to augment personalized programming on a predictable annual basis at these sites, at present, is limited.

The long-term success of this trilogy of UNESCO assets to attract and retain visitors from around the world relies on creating enough enticing people and program based visitor experiences along the route to warrant the journey. Experiences must be coordinated between operators in the different communities to ensure the offerings are tourism market-ready and available throughout the peak months of July and August, and ideally June and September in an attempt to further extend the season. Benefits to communities along the UNESCO route, such as Hawke's Bay, Port aux Choix, Conche, St. Anthony, and Battle Harbour, where tourism products exist, albeit some not market ready, could enrich the visitor's journey and must be considered when encouraging guests to visit, stop, stay and connect.

Opportunities / Recommendations:

1. **ACOA, BTCRD, Parks Canada (PC), WDMO, Destination Labrador (DL), Viking Trail Tourism Association (VTTA), Gros Morne Cooperating Association (GMCA), STEP Vinland and Operators:** Strike a working group of committed business leaders and operators who will step up and be willing to collaborate on developing tourism products, itineraries, and addressing hours of operation and seasonality issues from Gros Morne to Red Bay. Strategically plan a visitors journey that provides "enough to see and do" so they choose to make the journey between Western Newfoundland and Labrador. Use the Parks Canada EQ research to clearly define the ideal traveller type around which to develop the visitor experiences - target one or two types. In the event there are special one-time funding opportunities such as Canada's 150th celebrations in 2017, use this as a driver to ensure market readiness for pilot projects. Begin by reviewing projects already under consideration and add to this list as necessary. Then develop a prioritized list of near tourism market ready opportunities or projects.
2. **ACOA and BTCRD:** Create an experience product development funding program that invites partners, those identified in Recommendation #1, to come together and apply for funds for collaborative community and regional based tourism development (along the Viking Trail). Successful applications will emphasize development in the context of the customer journey between the identified sites, provide visitor touch points that strengthen the visitor experience, encourage incremental travel June to September, extend length of stay and encourage repeat visitation.

This recommendation supports goals 1.2 (inter-community level), 4.1, 5.1, 6.1, 6.2, and 6.3 of *Vision 2020*.

Finding 4: There is room to improve the sense of arrival and welcome at key entry points to the region and World Heritage Sites.

A sense of arrival implies that one has reached their destination. Ideally, this sense of arrival is in keeping with the perceptions generated through the promotional activities and in meeting expectations of the vacation experience in the mind of the traveller prior to the trip. In the Western region the TDVAA assessment found this area to be weak at key regional entry/exit points to the region and at World Heritage Sites.

The importance of first impressions, even driving traveller generated content with something as simple as a selfie, blogpost, or Facebook post upon arrival is important. For this reason, attention must be directed at improving the welcome and first impressions at the UNESCO World Heritage Sites and at the St. Barbe ferry terminal, among others:

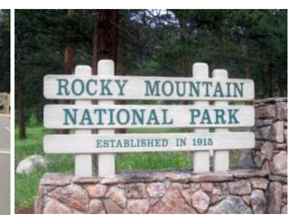
Opportunities / Recommendations:

1. **Marine Atlantic, Dept. of Transportation and Works (TW), BTCRD, PC, HNL and ACOA:** Investments at the Port aux Basques terminal and provincial Visitor Information Centres have gone a long way to enhance the sense of arrival and welcome. Similar action must be employed at the St. Barbe ferry terminal given expected increases to arrivals as a result of the drive for increased visitation to Red Bay NHS/WHS and the completion of the Trans Labrador Highway. This includes general beautification, landscaping, signage, and if possible, enhancing welcome centres to better leveraging retail options and food and beverage offerings at peak times of the year.
2. **PC:** Considering the notoriety of GMNP, the sense of arrival and welcome is underwhelming. To reward visitors who have taken the anticipated journey, enhancements must be made to the welcome and sense of arrival. PC should consider models from other national parks to inform these decisions, and in the near-term take steps to improve this situation when considering all entrance/exit point boundaries.

Banff National Park

Riding Mountain National Park

Revelstoke National Park



Rocky Mountain National Park

3. **TW, Municipalities and BTCRD:** Support the new TODS signage program, as it will enhance way finding signage throughout the region, reinforce sense of arrival and, to a certain extent, the welcome.

This recommendation supports goal 2.2 and 4.2 of *Vision 2020*.

Finding 5: A concerted effort to grow overnight visitation to the communities within Gros Morne National Park is needed in the months of June and September.

Acknowledging that GMNP is the primary tourism demand generator for the region, a close review of annual roofed accommodation occupancy within the park revealed lower occupancy in all months except July and August. While occupancy is above both regional and provincial averages in July and August, performance in the other months, especially May, June, September, and October are below other Western sub-regions and provincial performance.

The inventory of available rooms change over the months (May 10,414, June 12,629, July 13,454). In terms of roofed accommodation occupancy the rates move from 5.7% in April to 15.5% in May, then 38.2% in June before reaching 74% in July.[6] A similar pattern occurs starting in August when occupancy is 82.1% then drops to 39.1% in September and 12.8% in October when available rooms also change (August -13,391, September -12,172, October -10,088).

[6] Government of Newfoundland & Labrador. (2014, Nov 5). Document prepared by the Department of Business, Tourism, Culture and Rural Development. Source: Accommodation Component of TDMS II.

Trails, Tales and Tunes (TTT), a festival now entering its 9th year is currently attracting 8000 to 9000 visitors annually[7] to Norris Point and the surrounding communities over a 10-day period each May. Despite the steady successful growth of the festival, the roofed accommodation occupancy increase driven by the festival to kick-start the high season is followed by the occupancy gap in June and July remains considerable.

By focusing attention on developing new products and experiences for June and September when the major attractions are open and the weather is acceptable, these fluctuations could be mitigated. Additionally, recognizing “high tide floats all boats” the potential spin-off benefits to other areas within the Western region could be realized if GMNP and operators within the park can enhance its ability to attract higher levels of visitation and/or increase the length of stay during June and September.

Opportunities / Recommendations:

1. **PC, GMCA, WDMO, Operators and BTCRD:** Examine together the Western region Parks Canada EQ research and Prizm data to focus understanding on the primary visitor types to GMNP and the Field Unit, then identify targeted product development projects led by Parks Canada and tourism operators to create a critical mass of experiences in June and September. Include BTCRD and WDMO travel trade representatives to ensure insights into the group market are known and can be influenced by development decisions.
2. **PC, GMNP, Municipalities and Operators:** Apply lessons learned from Synergy Louisbourg[8] and the Fortress of Louisbourg NHS in Nova Scotia in working together to grow tourism with a wide range of visitor experiences offered by both the Parks Canada Agency and local businesses. This has diversified visitor appeal, price point of visitor experiences and introduced new reasons to visit and revisit this World Heritage Site.
3. **PC, GMCA, WDMO, Operators, TTT, BTCRD, North Western Coast Communities and Operators:** Extend the Trails, Tails and Tune theme, building on the successful thematic positioning into June. Examine the history of how Celtic Colours evolved from a small festival to one that now benefits the entire region of Cape Breton Island to determine how a similar long-term growth strategy could potentially drive visitation beyond the Rocky Harbour/Norris Point/Woody Point hub and connect guests with activities in Trout River, St. Paul’s and Cow Head up to Hawke’s Bay, Port aux Choix, Roddickton, Conche and St. Anthony throughout the month of June.
4. **PC, BTCRD, ACOA, GMCA, Town of Rocky Harbour and Operators:** Ensure the Rocky Harbour waterfront development project is positioned beyond benefits to the local community and used as a staging ground for increased visitor experiences at the retail, activity, and program level, with specific invitations to visit, stay and tour the region in June and September.
5. **ACOA, GMCA, BTCRD and Municipalities:** Prioritize investment in projects that demonstrate collaboration between infrastructure-based, activity-based, and people/program-based businesses working together to drive June/September visitation in the region.

This recommendation supports Goals 1.3, 4.1, 4.2, 4.3, 6.1, 6.2, 6.3, and 7.1 of *Vision 2020*.

[7] Arsenault, N. & Davar, C. (2015). *Trails, tales and tunes: A GMIST case study and success story.* A case study prepared for the Edge of the Wedge Experiential Travel Training at the Gros Morne Institute for Sustainable Tourism.

[8] Arsenault, N. and Payne, D. (2014). *From a dead end … to a destination.* A case study on a successful path to revitalizing tourism at the destination, complete with community pride, new investment and new visitor experiences. Downloaded: https://www.scribd.com/doc/244667997/From-a-Dead-End-to-a-Destination-Synergy-Louisbourg-Community-Engagement-Tourism-Case-Study

Finding 6: Opportunities exist to expand the trails and trail networks, but such initiatives must be led by community champions who benefit from the economic spin-offs derived from attracting this customer type.

The variety of trails found in the region are significant, from wet land, back country, coastal, mountain and riverside trails to trails on geological sites (proposed Cabox, Blanche Brook, Tablelands, Humber Valley, Burnt Cape) and on natural wonders (Western Brook Pond, Codroy Valley, Thrombolites, Limestone Barrens, and the Underground Salmon Pool). As a result, the region enjoys notoriety and critical acclaim as a soft-adventure destination for walking, hiking, and riding (ATV, snowmobile and bike). BTCRD's trail specialists and trail advocates at the community level have long recognized this and there is a collective desire to better leverage the trail assets throughout Western Newfoundland. There are underdeveloped trails and trail networks that offer significant potential to attract greater visitation and longer stays

BTCRD is spearheading a cluster based approach for trail development throughout the province. Where trail networks exists in communities such as Rocky Harbour, Norris Point, Codroy Valley, Deer Lake, Steady Brook, L'Anse aux Meadows, St. Anthony and Corner Brook, efforts are being made to expand trails using the cluster-based approach in partnership with and through the support of local businesses. This should be encouraged throughout the region.

Opportunities / Recommendations:

1. **BTCRD, Dept. of Environment and Conservation (ENVC), ACOA, PC, the Newfoundland and Labrador Snowmobiling Federation (NLSF), Local Snowmobile Clubs, Municipalities, WDMO and Operators:** The region's snowmobile and ATV trails present an immediate opportunity to stimulate business in shoulder and winter seasons. Interested operators should identify ways to fully leverage this aspect of the region's trail networks through the regional snowmobile and ATV trails working group. The first task for the group is to prioritize those activities that must be implemented in the next 12 months in order to grow business revenues.
2. **BTCRD, ACOA, PC, Municipalities, WDMO and Operators:** Embrace and adopt BTCRD's cluster based approach for trail development in the Western region. This capitalizes on the presence of trail networks and connects trail groups to local community tourism-based businesses to ensure that trail development is done as a collective effort in order to enhance the visitor experience with trail activities, extend visitation in an area, drive greater economic impact and ensure long-term stability for the trail. This approach entails:
    a. Understanding the drivers; hence investment partners, for community trails vs. trails that drive tourism visitation and increase the length of stay and spend for resident and non-resident travellers;
    b. Ensuring any investment goes beyond infrastructure investment and pre-plan the opportunities for single vs. multiple-use trails, revenue generating potential of visitor activities on the trail, long-term trail maintenance, and promotional appeal in generating awareness for the community/sub-region;
    c. Educating proponents invested in development process about how to secure a license to occupy permits, connect to accommodators, food and beverage (F&B) establishments, retailers, that meet the Tourism Assurance Plan (TAP) criteria;
    d. Target communities who could benefit from a cluster approach for a trail network; and
    e. Align inter-governmental interests and requirements from environmental and archaeological assessments, to municipal interests, to tourism product development and marketing to optimize all investments for the greater good and sustainability of the land.
3. **BTCRD, ACOA, Municipalities, WDMO and Operators:** Prioritize funding for trails networks and specific enhancements for those projects that consider the visitors journey and link several communities and trails together with other anchor attractions (e.g. national historic sites) to create holistic appeal that encourages overnight stays and participating in other community tourism offers.

This recommendation supports goals 1.3, 4.1, 4.2, 4.3, 6.2, 6.3 of *Vision 2020*.

Finding 7: There is opportunity to better leverage salmon angling opportunities in the Western region.

Newfoundland and Labrador boasts 60% of all North American Atlantic Salmon rivers. The Humber River is the largest Atlantic salmon producing river in Western Newfoundland and the second largest in the province. It has an annual run of 30,000 to 50,000 Atlantic salmon, one of the highest densities in the world and an untold amount of brook trout. In addition to the Humber River, there are a number of angling opportunities throughout the region that are highly desirable and relatively accessible to the resident and non-resident enthusiast. The Western region is clearly an angler's paradise. Yet, with significant notoriety and critical claim, the full potential of these treasured assets can be further leveraged in ways that garner increased visitation yet protect the rich natural resource.

The Newfoundland and Labrador Outfitters Association (NLOA) identified angling as the lynch pin to growth of the outfitting sector. The NLOA has recently completed a Business Retention and Expansion (BR&E) study that reinforced this observation. In conversation with representatives from the NLOA, BTCRD, and the WDMO two streams of activity were identified in order to strengthen angling experiences and to attract incremental guests:

- Equipping outfitters in ways that enhance their tourism market readiness by helping them provide expanded tourism market ready services to anglers beyond guiding and equipment.
- Increasing promotional investments for marketing tourism ready products and experiences

Opportunities / Recommendations:

1. **WDMO, BTCRD, NLOA, Outfitters and Operators:** Gather tourism leaders who recognize angling as a growth opportunity and, where applicable, work in partnership with the NLOA to learn from the BR&E study in order to facilitate a process that assesses the strengths, gaps and challenges in the current offer. Develop a prioritized list of actions that capitalize on the strengths and addresses the weaknesses while enhancing the appeal of the Western region as a must visit angling destination for non-resident avid anglers.
2. **WDMO, BTCRD, and NLOA:** Take a proactive role in helping outfitters understand how to move beyond 'listings' to effectively convey the experience differentiation, enhancing the call-to-action, and closing the sale relative to today's consumer expectations.
3. **WDMO, BTCRD, NLOA and Outfitters:** Determine if there is merit in profiling salmon as the regional unique selling proposition, which would complement the TDVAA Labrador recommendation to focus on big trout in the north.
4. **NLOA, ENVC, BTCRD, ACOA, Outfitters and Operators:** Increase the number of competent and quality guides that anglers can access in order to fish the waters of the region by raising the profile and importance of guiding. Introduce *"Glorify the Guide"* (example working title), an initiative designed to recruit more guides and encourage them to get involved in providing service to visiting anglers to ensure they have a memorable experience.
5. **NLOA and BTCRD:** Define the role of the NLOA in the tourism development process against the backdrop of new organizational leadership and the recognition of the importance of angling and hunting to the province's *Vision 2020* goals.

This recommendation supports goals 4.1, 4.3, 6.1 and 6.3 of *Vision 2020*.

***Note:** There is opportunity to implement some of the above recommendations on a larger scale by including Labrador and Central Regions in the angling development strategy.*

Finding 8: Action needs to be taken to help hoteliers drive higher revenue per available room (REVPAR).

While REVPAR within the Western region has been on a steady incline from 2009 to 2013 ($40.93 - $45.57), it is still well below the provincial average ($51.88 - $65.89). There is no doubt that room nights sold and rates associated with resource development has impacted the provincial average in regions such as Labrador and St. John's, however, there is an opportunity to raise REVPAR in Western if proactive steps are taken at the operator level.

Of the 287-roofed accommodation properties (hotel, motel, inn, B&B, cottages/cabins), the vast majority are independently owned, non-branded properties. Currently, there are only three branded properties in Western Newfoundland. In addition, outside the more frequented visitor destinations like GMNP, Corner Brook, St. Anthony, and the airport hub of Deer Lake, roofed accommodation options are limited in terms of quality, consistency and offered amenities. These factors, along with a low Canada Select rating associated with the quality and amenity level offered, impacts an accommodator's ability to charge rates comparable to other parts of the province and attract a visitor willing to pay a higher price point which, this study revealed is a rating of 3.5 and higher.

Opportunities / Recommendations:

1. **HNL and Tourism Quality Assurance NL Inc. (TQA):** Establish upgrade targets that monitor progress of the number of properties that improve their star rating.
2. **HNL, BTCRD, ACOA, and TQA:** Continue to provide customized advice to accommodators suggesting to them where to invest in upgrades to improve the quality of their properties as a means of increasing their star rating and leading to revenue growth over the long-term. This could range from small investments for adding visitor value such as Wi-Fi, clock radios with built in cell phone chargers, modern soft goods (bed spreads, sheets, towels, drapes, shower curtains), fresh paint/wall coverings, keyless door locks, electronic payment/booking systems, enhanced bathroom amenities (soap, shampoo, conditioner, body lotion) to higher cost physical infrastructure upgrades that are expected by today's travellers.
3. **BTCRD, WDMO and Operators:** As properties reach 3.5 and/or move to 4.0 or 4.5, ensure this is communicated to the Travel Trade representatives, as this opens a new door for potential visitation in markets that will not deal with properties below a 3.5 star rating.

This recommendation supports goals 4.1, 4.2 (private sector infrastructure) *Vision 2020*.

Finding 9: Opportunities to strengthen and market winter tourism should be supported.

The majority of the Western region's tourism receipts are generated in June to September. However, the region does generate significant levels of visitation in the winter months based on a long list of winter tourism assets available. Taking even further proactive steps to expand the region's travel season to embrace winter by better leveraging the winter specific outdoor assets is warranted.

The region is blessed with vast, crown-owned landscapes that are accessible year-round in many locations. There are hundreds of kilometers of groomed snowmobile trails as well as endless opportunities for back-country snowmobiling. At the Snowmobile Tourism Workshop held in March 2015 in Deer Lake, the Executive Director of the Canadian Council of Snowmobile Organizations referred to the region as a *"Goldmine"* for snowmobile tourism. At the session, some operators suggested anecdotally that 10 – 15% of their winter snowmobile business was from non-residents. Other operators suggested that number is even higher. For this market segment having reliable and accurate visitor data would be beneficial.

Nestled in the Humber Valley, Marble Mountain strengthens the case for further developing the winter season invitation to both the resident and non-resident markets. Recent investments at Marble Mountain such as the $4.5 million *Lightning Express* chairlift (North America's newest chairlift) along with the recently completed (March 2014) Marble Mountain Comprehensive Base Area Master Plan and Development Strategy, for example, add to the opportunity to grow winter tourism. In addition, many of the trail networks accessed by hikers in summer can also be easily accessed in the winter on snow shoes or cross country skis.

While Snow West was designed as a season extension event and lessons can be learned from it, operators, in partnership with other organizations, can take a lead role in developing targeted new winter business growth strategies. For example, the region has hosted numerous cross country skiing events at the regional, provincial and national level, which speaks to the notoriety of the vast trail networks.

Opportunities / Recommendations:

1. **WDMO and Operators:** Form a winter tourism steering group of businesses and organizations that will benefit from an enhanced, coordinated approach in developing winter tourism products. Focus on mobilizing operators who have tourism market ready or near tourism market ready winter experiences. As part of this approach evaluate the viability and sustainability of Snow West festival.
2. **NLSF, WDMO and Operators:** Focus product development and marketing activities to attract avid outdoor recreationalists interested in trail and back country snowmobiling.
3. **WDMO, BTCRD and Operators:** Complete a winter tourism Economic Impact Study to benchmark current impacts and then repeat every 5 years to monitor results.
4. **BTCRD, ACOA, WDMO, Operators and Marble Mountain Development Corporation:** Review the recently completed Marble Mountain Comprehensive Base Area Master Plan and Development Strategy and work together to evaluate its merits against the opportunity to increase winter tourism.
5. **BTCRD, WDMO and Winter Operators:** Establish a theme around which all winter activities along the west coast can be used for specific promotional campaigns moving forward. Develop a promotional strategy that targets winter enthusiasts and considers a “Celebrate Winter” positioning for the Western region. Efforts should focus on promoting the snowmobiling, downhill and cross-country skiing opportunities.

This recommendation supports goals 3.1, 4.1, 6.1, and 6.2 of *Vision 2020*.

Finding 10: Cruise, sports, meetings and conventions represents growth market opportunities for select communities within the Western region.

Meeting planners and sports organizations are looking to maximize their impact and effectiveness by holding more regional events, with smaller budgets and servicing delegations living closer to home rather than larger annual events. Smaller destinations like Corner Brook and Gros Morne could benefit from this trend and increase their visitation if they take proactive steps to prepare and solicit business. Additionally, efforts to secure and service cruise based business activity would have positive impacts to select communities on the west coast of Newfoundland.

Currently, we know anecdotally many destinations across the country benefit from strong levels of visitation generated from the sports tourism, meetings and conventions (M&C) and cruise markets. Success in these sectors is dependent on built infrastructure and the collaborative sales and marketing that attracts spectators, teams, athletes, cruise ships, and meetings/convention delegates to the sports venues, ports of call, convention or conference centres, roofed accommodators and activity-based businesses.

Within Atlantic Canada, there has been a growing focus on attracting cruise, sports and M&C business. For example, fifteen years ago Halifax and St. John’s were the more visible M&C destinations soliciting business from Toronto, Ottawa or Montreal. Now Fredericton, Moncton, Saint John and Charlottetown are regularly in market, attending meetings, industry trade shows, and promoting their facilities. Interest in cruise business has also grown, with St. John, Charlottetown, Halifax and St. John’s all competing for a piece of this growing market segment. Sports tourism has been identified by many as the poster child for economic growth in communities across the country and now destinations large and small are taking steps to capture a piece of this lucrative market segment.

Opportunities / Recommendations:

1. **WDMO, GMCA, and Corner Brook Facility Managers:** Prepare a regional booking calendar that tracks future need periods over a 3 to 7 year period against the backdrop of current business on the books including leisure, travel trade, cruise, and sports bookings for Corner Brook/Humber Valley and GMNP/Rocky Harbour. Then, develop a set of promotional and sales tactics that will lead to increased conference business from each sector. This includes leveraging the size of events suited to facilities in Corner Brook/Humber Valley and GMNP/Rocky Harbour and leveraging its unique location and surrounding tourism assets.
2. **WDMO and the Corner Brook Facility Managers:** Leverage funds generated from the proposed Corner Brook room levy to secure new meeting, convention, sports tourism and cruise business at times of the year when the business is most needed.
3. **WDMO, Cruise NL, PC, Port aux Basques, Corner Brook, St. Anthony, L'Anse aux Meadows and the Gros Morne communities of Rocky Harbour, Norris Point and Woody Point:** Leverage knowledge gained through the successful hosting of the 2014 Canada-New England Cruise Symposium by fostering relationships with cruise line decision makers to secure more ship visits with multiple itineraries to Port aux Basques, Corner Brook, St. Anthony, L'Anse aux Meadows, and GMNP. In addition, encourage the development of interesting, exciting and customized shore excursions (based on customer preferences) that offer opportunities to discover the unique sites and experiences found in and around these port communities.

This recommendation supports Goal 6.3 of *Vision 2020*.

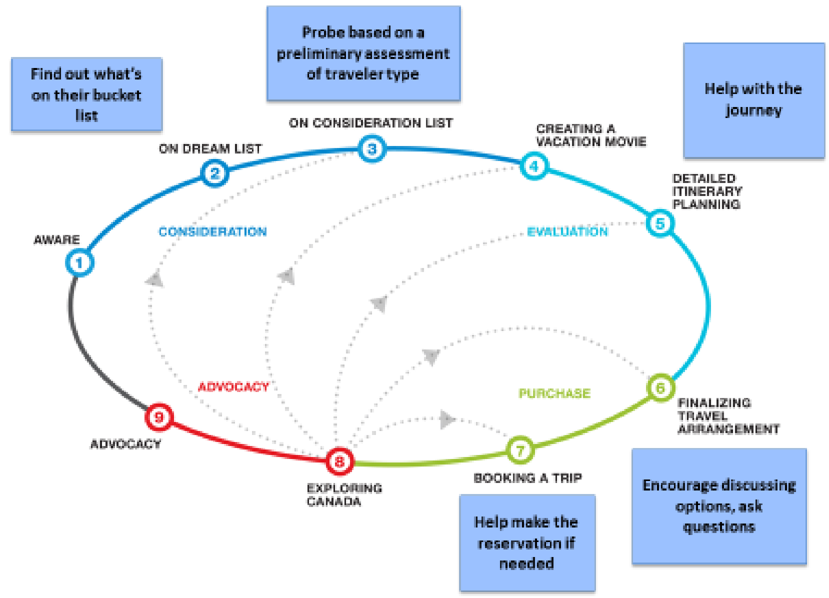
Finding 11: Innovative visitor servicing solutions need to be found that enrich the information available on the ferries and while travelling along the west coast.

Jurisdictions across Canada are examining how to evolve traditional visitor servicing that relies 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 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 effort along the path-to-purchase 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 3). 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.

Figure 3: VIC Role in Path to Purchase



Opportunity/Recommendations

1. **BTCRD, Marine Atlantic, Select Municipalities, Port Authorities, Western region Airport Authorities and WDMO:** 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 on the west coast of Newfoundland where connectivity issues and existing pockets for mobile solutions are limited. This could include ideas such as:
   - Create partnerships with businesses (e.g. gas stations or recreation centers) and Marine Atlantic in smaller communities where visitors are likely to stop and an information kiosk could provide digital information. Ontario has a kiosk approach that could be examined. The key to success is placement where visitors would typically stop in a small town and having a service agreement with the business;
   - Invest in a joint service agreement with Nova Scotia for an information kiosk with Wi-Fi access to tourism information in Sydney (NS), Port aux Basques and Argentia (NL);
   - Explore 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;
   - Create an online chat function or call centre link to the VIC staff in Deer Lake; and
   - Create a mobile VIC van that is available at the ports upon arrivals, but could also be sent to other venues and events in the region to provide visitor information to guests.
2. **BTCRD, TW, ACOA and Marine Atlantic:** Invest in targeted visitor servicing activities on the Port aux Basques and St. Barbe ferries that ensures the captive audience on these vessels have access to relevant tourism promotional information during their sailing.

This recommendation supports Goals 4.1 4.2, 5.1 and 6.3 of *Vision 2020*.

Finding 12: Improving the food and beverage experience in the Western region will support travellers' growing interest in culinary experiences, but owners/operators face a number of challenges.

The culinary scene in GMNP, the Corner Brook/Humber Valley area and L'Anse aux Meadows continues to flourish demonstrating that it is possible to offer high quality, diversified food and beverage dining experiences in smaller communities. Neddies Harbour Inn, Java Jacks, Justin Thyme, the Oceanview Hotel, Earle's, Sugar Hill Inn, the Daily Catch, the Norseman, Madison's, Gitano's, and Newfound Sushi are good examples of restaurants that have invested in responding to the demand for quality, local food that caters to a variety of travellers at differing price points. The use of local foods and recipes, the competency of their chefs, cooks and wait staff all contribute to success in attracting a customer willing to pay more to dine. Additionally, many proprietors have availed themselves of learning opportunities offered through the Gros Morne Institute for Sustainable Tourism (GMIST) and the Bonavista Institute for Cultural Tourism (BICT) programming to improve and diversify their food offerings, visitor experience and skills of their chef and staff. In other communities, there are charming cafés offering quaint and comfortable ambiance and informal dining options and some feature a variety of local food products. This is an indication that raising the quality of the culinary offering in the region, even if only in high season, is possible.

There are, however, market realities that add challenges to the task of enhancing the culinary offering in the region. Many operators find it difficult to secure reliable and talented staff. From wait staff to cooks to chefs, labour challenges plague this sector. In addition, sourcing quality food can be a challenge especially during the off-season and in smaller communities. Therefore, in spite of positive signs in some areas, collective work is still required if the situation is to change in the near term.

Opportunities / Recommendations:

1. **RANL, HNL, BICT and College of the North Atlantic (CONA):** With knowledge that the F&B sector is facing challenges, steps must be identified and actions implemented to address areas of concern. Focus must be directed at improving food quality, consistency and service delivery especially outside the few core tourism areas.
2. **WDMO, BTCRD, HNL, BICT and RANL:** Best practices, culinary retreats throughout Western region, or mentoring programs with Red Seal chefs in order to create new menu items and redesign existing offers could be explored as well as encouraging targeted restaurants along the west coast to invest in staff culinary training programs offered by the Bonavista Institute for Cultural Tourism.

This recommendation supports 4.1 and 7.2 of *Vision 2020*.

Finding 13: Industry stakeholders would benefit from having tourism performance data that delineates non-resident transportation and accommodation statistics by type of travel.

Ensuring tourism related performance is reported at a level that assists industry in business planning and decision making is essential. By having statistics that delineates non-resident vacation/leisure/pleasure, business, VFR and commuting travel would clearly assist stakeholders in business planning. Having performance data of this nature for air traffic, ferry traffic, car rental and accommodations would be beneficial.

Opportunities / Recommendations:

1. **BTCRD, ACOA, Transportation Providers and Operators:** Provide tourism performance data that delineates the non-resident vacation traveller from other categories of travel. More specifically, provide delineated performance data pertaining to non-resident air and ferry arrivals, car rental and roofed accommodation occupancy.

Finding 14: Operators expressed interest in understanding customer profiles for resident and non-resident travellers to guide their product development and marketing decisions.

With resident travellers representing 90% of provincial visitation, being able to access, understand and apply information, such as customer profiles, would help operators better understand the Western region's non-resident travellers. As tourism competition increases world-wide, and new primary demand generators focus on new development (such as Fogo Island), Western region operators would like to be able to access information, specific to their region, that informs where to direct their investments in new/enhanced product development and promotional activities.

While a significant number of studies exist, this becomes part of the challenge. There is so much information available, as the bibliography for each TDVAA demonstrates. Accessing and interpreting the relevance of the information in a timely fashion to inform decision making is a challenge. Additionally, some operators may have limited knowledge of how to find, extrapolate and apply the research. Creating, for example, simple, customer profile snap shots on current, future or potential resident and non-resident customers would assist operators to enhance and cater their offering to specific guest types. Ontario has used this approach, as has Northern Ireland and the Canadian Tourism Commission. In addition, ensuring operators know they can access the expertise of BTCRD's research professionals is important and no doubt would be of great value.

New lower cost opportunities for provinces to access the CTC Explorer Quotient (EQ) research was announced at the November 2014 Tourism Industry Association of Canada (TIAC) conference. They confirmed that all provinces and territories have the opportunity to gain access to this research for $25,000 per year.[9] This fee includes all research reports and the data sets in excel and SPSS. This opens the door for the province to access additional existing research that provides psychographic insights into traveller's attitudes, motivations and behaviors, combined with traditional demographic measures. This information could be a valuable addition to the province's wealth of other consumer research.

Opportunities / Recommendations:

1. **BTCRD and HNL:** Explore simple outreach tools that would assist operator's access and understand available consumer profile research. Consider introducing annual online research webinars delivered by BTCRD's research professionals and a toolkit that consolidates the visitor profiles of the domestic and non-resident traveller.
2. **BTCRD, PC and Regional DMOs:** Investigate where the front-line opportunities are to connect operators with relevant EQ information to guide product development and marketing activities. As Parks Canada was the first organization to secure a license, their experiences with this information and how they have used it to influence product development and promotions would be informative.
3. **WDMO:** Review how two regional DMOs in British Columbia (Thompson-Okanagan Region and Vancouver Island)[10] used the EQ research to strengthen the effectiveness of their organization and business partners.
4. **Operators:** Use the free EQ toolkits and visitor profiles that are available online now to take the initiative to start examining this consumer research information to influence business decisions.

This recommendation supports 3.1and 7.1 of *Vision 2020*.

[9] Canadian Tourism Commission. (2014, Dec). *A presentation titled: 2015 EQ proposal from the CTC.*
[10] Canadian Tourism Commission. (2012). *EQ up close case study series: British Columbia's regional approach to EQ from strategy to tactics to results.* Retrieved from http://en-corporate.canada.travel/sites/default/files/pdf/Research/EQ/05-eq_casestudy_bc.pdf

Finding 15: Due to the increase in regions collecting a room levy from visitors in Western region, concentrated efforts must be made to ensure the tourism industry collaborates and leverages these funds effectively to grow visitation and tourism receipts.

With the introduction of levies across the country, municipalities in Newfoundland and Labrador requested that provincial legislation for the implementation of accommodation room levies be considered. HNL has taken a position on this issue on behalf of the tourism industry: that any levies decided upon, in any jurisdiction, should be approved by those expected to implement the levy.[11] The introduction and management of room levies should be industry led with monies collected re-invested into tourism marketing and tourism development. While these conversations take place and outcomes revealed, there are jurisdictions within the Western region already collecting levies. For this reason a strategic approach for spending funds must be considered.

The Tourism Southwest Association (TSW) collects 3% from roofed accommodators within the island's southwestern boundaries of Economic Zones 9 and 10. Similarly, the Gros Morne Gatherings collects 3% from roofed accommodators within GMNP while the Viking Trail Tourism Association (VTTA) receives $1 per citizen annually from the communities of Bird Cove and Port aux Choix and collects 3% from its participating operators. Corner Brook, and other accommodators located along the Humber Valley are also exploring introducing a levy in their areas. Any new dollars earmarked for provincially aligned tourism product development and promotion is welcomed. Wise tourism destinations, however, collaborate to compete in order to maximize their impact and minimize duplication. For this reason fostering collaboration among those groups that either have or are considering introducing a levy is required.

Many of the sub-regional stakeholders currently collecting a levy volunteer on the WDMO Board and/or other tourism related organizations such as the Newfoundland and Labrador Tourism Board and HNL, and therefore, have a good appreciation of the benefits of working together. Strategic and collaborative investments will help identify specific roles and responsibilities for these levy groups when it comes to tourism promotion and development.

Opportunities / Recommendations:

1. **WDMO, various levy groups, PC, BTCRD and ACOA:** Host an annual, or bi-annual meeting, through the WDMO to discuss the potential for leveraging investments for product or market development initiatives, and promotional activities that would benefit the visitor in more than one jurisdiction. Any region-wide collaborative strategy must keep the customer at the heart of the respective strategies and collectively drive guests down a coordinated "path to purchase" avoiding duplication of efforts, resources and visitor messaging. An expected degree of transparency and accountability for both the collection and the allocation of these funds will be important every step of the way.
2. **WDMO, BTCRD, ACOA and HNL:** Where appropriate, support the efforts of industry stakeholders who want to establish a levy group within their respective areas and provide guidance in how to align the use of these auxiliary funds to drive visitation, overnight stay and growth in tourism receipts.
3. **WDMO and Levy Groups:** There is a proliferation of maps currently available to guests. This should be reviewed from the visitor's perspective to determine if there are synergies in content and opportunities to collaborate on their production creating a win-win for all, especially the visitor.

[11] NOTE: On December 5, 2014, Merchant Law Group LLP launched class action litigation on behalf of all Canadians who have paid destination marketing (levy) fees as part of hotel invoices or similar travel bills. The class action alleges that the Defendant hotels unlawfully charged consumers a 3% or 4% Destination Marketing Fee on top of the nightly room rate. HNL is monitoring the situation and liaising with national affiliate organizations

This recommendation supports goals 1.2 (at the community level), 6.1, 6.3 *Vision 2020*.

Finding 16: Currently, steps are in place to monitor impact on the natural resources within the Western region, however, further industrialization and resource based development must consider the balance of environmental, economic and social impacts of the region, now and into the future.

Environmental monitoring is taking place throughout the region by a variety of government, environmental and community groups. Those involved should be held in high regard. Current monitoring efforts are demonstrated in these examples:

- Special permits are required for commercial filming to help manage and protect certain sensitive areas including provincial and national parks and protected areas;
- Snowmobiling in GMNP corridors are closely monitored to protect sensitive areas;
- Salmon stock monitoring is taking place throughout the region;
- Municipalities (Glenburnie-Birchy Head-Shoal Brook or GBS) have been proactive in climate change adaptation planning;
- Coastal erosion and its effects on driving routes (such as Route 430, the Viking Trail) are being closely monitored; and
- Archeological digs at sites, such as in Port au Choix, are being closely monitored.

The threat of fracking, however, remains a major concern for the region's tourism industry in GMNP and the Port au Port Peninsula/Bay St George areas in particular. The concerns are warranted especially when considering the UNESCO World Heritage Site designation for GMNP comes under threat and draws negative international attention to NL. The industry must remain vigilant and work with governments and industry to ensure the protection of the region's natural assets and their contribution to the economic and social well-being of the people in the region is a number one priority.

Opportunities / Recommendations:

1. **HNL, GMCA, PC and WDMO:** HNL leads the advocacy/communications with the GMCA and the WDMO assisting in extending the message to keep tourism stakeholders within the region, and in particular those in GMNP and the Port au Port Peninsula/Bay St George area, appraised of the activity associated with discussions or movement on the fracking issue. When needed, mobilize people within these communities to make deputations and speak in favour of protecting the natural assets.
2. **HNL and the NL 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.
3. **HNL and Memorial University of Newfoundland (MUN) – Grenfell Campus and Province:** Revisit the concept of developing a set of tourism resource management guidelines or principles to ensure the protection of high-value tourism assets and the economic value they bring to the province. Leverage the expertise of MUN's Sustainable Resource Management program as well as UNESCO who suggested a buffer zone be established (HNL is advocating for the buffer zone and Tourism Resource Management Principles).

This recommendation supports 3.1 of *Vision 2020*.

Finding 17: The TDMS database has limitations, which if addressed, will benefit visitors, operators, and the province and assist in moving towards the achievement of goals outlined in *Vision 2020*.

The Tourism Destination Management System (TDMS) is a sophisticated marketing tool that annually invites TAP approved tourism businesses to provide targeted information about their business that translates into online and printed marketing reach. It also provides the province and visitors with important information about the company, which when aggregated provides vital information about the destination and industry. Designed to capture information relevant to consumers, it is also a source of business-to-business insight for product partnering, packaging, travel media and travel trade.

For a decade it has served the industry well, but as travellers are seeking new experiences, the online distribution channels are expanding exponentially and most travellers are very savvy. Ensuring the right type of information is available is vital to attract visitors and drive the sale. Ensuring the full depth and breadth of the things travellers are seeking from accommodations, to attractions, festivals, outdoor adventure, activities, parks and heritage sites is important. But travellers increasingly are looking for unique experiences as well as dining and culinary options and this is not captured in the database. There are musicians, storytellers, artisans, and a variety of people that connect with guests, and if they have a business and are TAP approved, they could be encouraged to be listed on TDMS thus increasing the inventory of experiences. Similarly, ensuring all the culinary options from restaurants to farmers markets, to specialty experiences could enrich the dining experience, which is an integral part of all travel. The TDMS database also represents a new business-to-business opportunity to locate potential experience providers, packaging partners and suppliers.

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 and is a finding that has been noted in the two Destination Development Plans (Eastern Newfoundland and Labrador) completed to date.

Appreciating that any enhancements to TDMS must serve the long-term future of the industry, increasing the scope of who can be on TDMS through working with other organizations such as the Craft Council of NL for example could enrich the information gathered and therefore be of benefit to the visitor.

Additionally, the importance of providing real-time data and the ability to dynamically update business information for optimal currency is a competitive advantage. Determining if future enhancements can allow a more frequent or dynamic update to the system could be beneficial. As well, regional DMOs could be solicited to assist in monitoring the content as they are closer to the stakeholders and can contribute to ensuring the accuracy of data provided and/or flagging changes needed. Ultimately, ensuring visitors have access to current, real time accurate information will be an opportunity for the future.

Opportunities/Recommendations

1. **BTCRD and DMOs:** Explore the potential to include experience providers that are registered businesses, TAP approved and would add richness to the visitor opportunities. And simultaneously consider if there is a B2B option whereby individuals, who are not registered businesses nor TAP approved (e.g. artisan, musician, storyteller, guide) could be listed and make their services available to tour operators and businesses who would contract their services, as a TAP approved company.
2. **BTCRD and DMOs:** Revisit the role of regional DMOs in supporting the monitoring and accuracy of the TDMS system, for they are closer to the businesses, know when new companies began, others are sold or close their doors to keep it as accurate as possible.

3. **BTCRD:** Explore the affordability and practicality of a real-time system, whereby operators can join at any time, and update their company profile at any time to ensure visitors are optimally served.

This recommendation supports Goal 3.1 of *Vision 2020*.

Finding 18: There is an opportunity to better leverage TripAdvisor and Facebook to drive tourism visitation and revenues.

Websites: Tourism Businesses:

The Western region tourism businesses must be congratulated on their website presence. The majority of sectors have websites. Man-made attractions lead at 94%, followed by trails and routes (93%), outfitters (91%), culture and heritage based assets (86%), activity-based businesses (85%) roofed accommodations (79%), RV & campgrounds (75%), festivals and events (68%) and nature based assets (72%).[12] Program based companies are the weakest (21%). Relative to an emerging element of visitor experience development, this sets a good benchmark. While the presence of websites is strong, elements important to a visitor need to be enhanced in many businesses including: photos of visitors enjoying activities in/on/around the place of business, electronic payment, and online reservations systems to name a few. Sixty-seven per cent of towns and cities in the Western region have a website and of these, 41% have a tourism section, many with good ‘how to get here’ information (88%). Forty-one percent have a Facebook page.

Facebook, TripAdvisor and Blogs: Operators

Tourism businesses are not fully leveraging the readily available and low cost investment opportunity to grow their business through TripAdvisor and Facebook. This is a major opportunity for operators to strengthen their online presence and be ‘found’ where travellers seek information.

Only 36% of tourism businesses have a Facebook account. The sectors with the strongest presence are man-made attractions (76%), activity based businesses (67%), culture/heritage based assets (49%), and festivals and events (46%). The weakest presence on Facebook are nature based assets (26%), trails and routes (18%) and program-based businesses (14%). The activity-based assets and roofed accommodations assets receive the highest number of Facebook “Likes”, 44,327 and 30,287 respectively while 84% post photos, 34% videos, 30% a link to Google maps, and 26% to events.

An even smaller number of operators in the Western region have a TripAdvisor account (only 28%), the number one source for travel information in the world. This is less than the Eastern region (31%) but higher than Labrador (11%). Of the active TripAdvisor businesses, 46% of roofed accommodators have a presence, made attractions (53%), and activity based assets (46%). Inactive sectors include nature based (7%), festivals and events (5%), and outfitters (2%).

Opportunities / Recommendations:

1. **Operators:** Review website to determine where to add photos of visitors engaged in activities that bring their business to life. Ensure a call to action for direct sales is evident, and if working with the travel trade and/or travel media and would like to attract this type of interest, ensure there is information and a call to action on specific landing pages. Investigate online reservation systems, 75% require “how to get here information”, and for the 42% that do not

[12] See page 57, Chapter 4.

accept electronic payment, explore the growing number of options from traditional credit card companies, to PayPal to Square (as a few examples).

2. **Operators:** Understand the importance of having an accurate and complete business listing on the provincial tourism website and in the travel guide. Many operators are missing the mark here. TAP approved operators can optimize their presence by completing the appropriate paperwork required; this will differentiate their business and drive the sale.
3. **Operators, Municipalities and the WDMO:** Operators without a website should move to invest in one by the end of 2015. Of the vast majority with a website, visit the provincial YouTube channel (http://www.youtube.com/user/NewfoundlandLabrador) and the Canadian Tourism Commission (http://www.youtube.com/user/canadiantourism) to determine if there are any videos that are aligned with their product, story, community or region that can be hyperlinked, and add high-quality, professionally produced videos to their website.
4. **HNL, WDMO and Operators:** Increase number of tourism operators with TripAdvisor accounts by reinforcing its importance and encouraging participation on training programs to help people jump the digital divide and know how to interact, respond and resolve conversations with visitors.
5. **Operators, Municipalities and the WDMO:** Invest in high-definition images that portray the emotional and physical connection - the people, places, and ways the guest can engage. As new photo shoots are set by the province or CTC - the WDMO should ensure operators in their region are made aware of these opportunities and focus on securing images of guests engaged rather than more infrastructure images.
6. **WDMO, HNL and BTCRD:** Use the baseline data from the TDVAA to establish online social media operator participation targets for TripAdvisor and Facebook and monitor progress over the next 2 to 3 years.
7. **HNL, BTCRD, WDMO and Operators:** Ensure accommodators understand the opportunities associated with online booking engines by providing online training sessions and/or 1:1 counselling to explain what their options are for engaging with these tools that can impact their occupancy and bottom line.
8. **HNL, BTCRD and ACOA:** Revisit the training programs being offered to ensure they are reaching the operators most in need. Introduce engagement tactics to maximize participation and ensure training addresses the fear of the unknown, online time management with communications, responding to negative and positive comments, how to use the sites to drive conversation and, as appropriate, the sale.
9. **WDMO, HNL, BTCRD and ACOA:** Identify where there are gaps in internet access throughout the region and develop strategies to inform the visitor of ways to go online while in these areas (Wi-Fi in public buildings or common spaces) and ensure tourism advocates are involved in the inter-government department conversations to influence internet accessibility from the visitors perspective and needs of tourism operators.
10. **Municipalities:** Building a ‘tourism website’ is not recommended as this is not the core business of a municipality. Effort should be made however, in every municipality to ensure a tourism webpage exists with links to tourism businesses in the community, these websites remain up-to-date, and that the link to the provincial tourism website (www.newfoundlandandlabrador.com/Western) is well positioned, along with links to the community tourism businesses.

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

Finding 19: Festivals and events have the potential to grow tourism revenue and visitation and become primary demand generators with international, national and/or provincial acclaim.

The economic impact for festivals and events (F&E) can be significant, generating business for hotels, restaurants, retailers, tour operators and many others well beyond the event itself. Within the Western region, the scope of the 66 annual festivals varies. Six have critical acclaim and are identified as primary tourism demand generators, 12 are secondary tourism demand generators and 48 are community focused.

In order to fully leverage these tourism assets, a proactive and intentional event development strategy must be adopted. The strategy must ensure sustainability of the current demand generators as they have the greatest potential to contribute to increasing non-resident travel. Encouraging the secondary demand generators to consider what is required to become a primary event could present growth opportunities for a few of these events.

Opportunities / Recommendations:

1. **BTCRD and ACOA:** Evaluate the merit of a tiered funding support program for festivals and events that demonstrate contributions to tourism performance outcomes, and reward those that bring the greatest overall economic benefits to the region and province (e.g. the primary tourism demand generators events). Identify sources of funding to help further "professionalize" identified tourism-centric events to, among other things, support the volunteer networks that are at the heart of the success of these events, to ensure their long-term sustainability.
2. **BTCRD and ACOA:** Enhance the appeal of the secondary demand generator events to make them greater contributors to the local and provincial tourism economy by implementing an F&E tourism development initiative that would focus on:
    - Development of more viable financial models that would support, among other things hiring of paid professional event staff, as opposed to being totally reliant on volunteers.
    - Enhancing long term sustainability and success by helping event producers understand how to develop programming that considers the visitor and tourism market ready; and
    - Encouraging extending the length of an event in order to increase potential to attract the visitor market.

Note: Recommendations 1 and 2 have provincial wide implications.

This recommendation supports 3.1, of *Vision 2020*.

Finding 20: Early reports on the Tourism Assurance Plan (TAP) approval are raising red flags in a few sectors where common challenges are being identified.

The Newfoundland and Labrador Tourism Board is leading the effort to elevate and communicate to visitors the quality of tourism services and attractions available in the province. The *Tourism Assurance Plan (TAP)* was developed to define common minimum standards for tourism businesses in order to meet the expectations of today's visitor. As of January 1st, 2015 only businesses that meet the minimum standards will be promoted in provincial and DMOs marketing activities. Additionally, these standards must be met in order for tourism services and attractions to participate in provincial development initiatives, qualify for membership in Hospitality Newfoundland and Labrador (HNL) and participate in partnership/membership activities with the Destination Management Organizations, including the WDMO.

In general, the introduction of this provincial-scale voluntary quality assurance program has been welcomed by the tourism industry. However, some sectors are challenged in becoming approved including festivals and events, crafts people/artisans, not-for-profit attractions, outfitters and program/people based tourism entities. The two main items that have been identified as a challenge among these groups are related to the insurance and electronic payment requirements of the TAP program. Tourism development partners have gone to great lengths to help operators understand affordable and effective solutions to these challenges but some are still not approved. All partners involved in the ongoing monitoring of the TAP program are committed to continuing to encourage and work with stakeholders that are interested in addressing any outstanding requirements.

Opportunities / Recommendations:

1. **HNL, BTCRD and the WDMO:** Re-confirm the sector groups that are having issues meeting these two particular TAP standards and determine which collaborative actions across the tourism development-related organizations are required to assist. People/program/festival and event sectors are vital to raising the bar on the visitor experience and the value of different activities, but do not generate the volume and revenue full-time operators/registered businesses do therefore finding creative ways to help them become approved will be critical. The hope is to identify among the partner groups an agreed on methodology that realizes efficient solutions.
2. **HNL, BCTRD, Tourism Quality Assurance of NL Inc. (TQA) and the WDMO:** HNL should develop a visible symbol to recognize TAP approved businesses that clearly identifies these operators to the public and to other operators. Examples from the Better Business Bureau, Canadian Signature Experperience programs use tools such as logos, stickers, website identifiers, etc. BCTRD and the WDMO should provide marketing incentives or recognize these companies in some way to increase the critical mass of operators who shift from non-approved to approved.
3. **HNL:** Develop support tools for industry colleagues in BTCRD and the WDMO to assist them in effectively communicating the value of TAP, solutions, resources, and information to increase the collective understanding of all. Consider sub-regional sessions, tied to existing industry events to cluster non-approved businesses to learn about their challenges, resistance, but also provide information and encouragement.

Note: This finding has relevance through the entire province, as this is the first TDVAA where TAP approval is now in effect.

This recommendation supports goals 1.2, 1.3, 6.3 of *Vision 2020*.

Finding #21: 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 (of the original seven) *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 2020s* product development objectives to be realized.

4. Informing the Findings

Gifted with some of the most picturesque landscapes in Canada, the region's coastal and mountain vistas are equal to any in the world. The finger of land located on the westerly coast of the island of Newfoundland is a region that stretches 700 kilometers from Channel-Port aux Basques in the south, through the Humber Valley and Gros Morne National Park, to the Viking site of L'Anse aux Meadows near the tip of the Great Northern Peninsula at St. Anthony.

While its landscapes are spectacular, it is the people that offer charm and personal memories to any visitor's journey. Welcoming, friendly, and engaging locals certainly puts smiles on the faces and warmth in the hearts of all those who visit. The authenticity is palpable, hospitality is second nature, and an entertaining sense of humour can be found with most everyone you'll meet, be it at the corner store, a festival or event, hiking on a coastal trail or snowmobiling in the back country. The people of the Western region, their connection to the land, their culture and their music are what sets this tourism destination apart and makes it the most visited region in Newfoundland and Labrador after the City of St. John's.

Photo: http://gowesternewfoundland.com

The land here has a unique geological history dating back 1.25 billion years, and a human history spanning 4,500 years. Gros Morne National Park is an internationally renowned UNESCO World Heritage Site stretching across 1,805 square kilometers, encompassing the towering Long Range Mountains and the unique Tablelands. Travellers can step back in time and explore the first European settlement of the new world at L'Anse aux Meadows National Historic Site. This Viking village, also a UNESCO World Heritage Site, features a reconstructed complex of sod huts that offers a glimpse into the life of Nordic visitors a thousand years ago.

The region is also home to the International Appalachian Trail, which extends from Mount Katahdin, Maine, through Eastern Canada and stretches fully across the Western region of Newfoundland Labrador, before extending into Europe. The City of Corner Brook is a sizeable hub of activity just five minutes away from Marble Mountain ski resort. This is a place of mountains and conservation areas, like the Codroy Valley International Wetlands, where you can watch wildlife such as migratory birds; it is an endless place for creating memories.

The Western region is well positioned, with the right investment, to move to the next level of competitiveness and appeal. It is rich in opportunity, ripe with emerging tourism experiences and experienced operators.

4.1 The Tourism Barometer

Tourism is an economic driver and a source of full-time and seasonal jobs. It provides support to governments at all levels through tax revenues generated, which can then be reinvested into infrastructure, health care and social service programs among other things.

> *"Despite geopolitical and economic challenges, the number of international tourist arrivals has grown by 5% a year on average since 2010, a trend that has translated into more economic growth, more exports and more jobs."*
>
> UNWTO Secretary General, Taleb Rifai, UNWTO World, Tourism Barometer Aug 2014

One of the fastest growing industries in the world, the demand for travel continues to increase and the competition for visitors is fierce, particularly from emerging destinations, some of which are increasing at a rate 13% per year.[13]

Long-term projections to 2030 see emerging economies garnering 57% of international arrivals (up from 30% in 1980) and advanced economies (which includes Canada) securing 43% of the market. The UNWTO (January 2015) reports that global international arrivals increased 4.7% in 2014, well above its long-term projection of 3.8%.

In 2014, international tourist arrivals (overnight visitors) reported by destinations around the world reached 1.1 billion, representing a 4.7% increase over the previous year or 51 million additional overnight trips. This is the fifth consecutive year of growth above the long-term average (+3% to +4%) since the 2009 financial crisis. By region, the Americas (+7%) and Asia Pacific (+5%) registered the strongest growth, while Europe (+4%), the Middle East (+4%) and Africa (+2%) reported moderate growth[14].

Nationally, tourism activity generated nearly $88.5 billion in revenues and Canada's tourism sector accounted for $34.4 billion in Gross Domestic Product in 2014. The sector employed more than 627,000 people in over 170,000 businesses. Total overnight international visitors to Canada increased to 17.1 million, up 3.2% over 2013. While Canada's tourism arrivals are gaining momentum, this is still below the global average growth rate of 4.7%[15]

In 2014, all major tourism indicators for Canada—tourism revenue, GDP, arrivals and employment—increased. Canada's tourism industry is one of the country's fundamental economic drivers and is the country's number one service export. Total overnight international visitors to Canada increased to 17.1 million, up 3.2% over 2013. While Canada's international tourism arrivals are gaining momentum, this is still below the global average growth rate of 4.7%.[16]

Increased air capacity is helping fuel growth in Canada. In 2014, over 260,000 seats were added to/from overseas markets and 454,000 to/from the United States compared with 2013. The bulk of the new (165,000+) capacity to/from overseas markets was added to service China, Germany and Japan. France added nearly 20,000 seats, mostly from Air France and Air Canada.[17]

Overnight trips by Canadians to the US and other countries increased 1.5% in 2014, continuing the previous year's upwards trend. Due in part to a weak Canadian dollar, overnight trips by Canadians to the US decreased 1.8% however trips to other destinations increased 9.6%.

From January to December 2014, the national occupancy rate rose (+1.5 points to 64.3%) compared with the previous year. PEI (+3.4 points), BC (+3.0 points) and Quebec (+2.8 points) recorded the largest gains in hotel occupancy during 2014. During the same period the national average daily rate rose to $137.28, up 3.7% compared to 2013. BC (+4.8%), NL (+4.7%), PEI (+4.5%) and Quebec (+4.0%) recorded the highest increases in average daily hotel rates. In 2014 Revenue per Available Room

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[13] World Tourism Organization. (2013). *UNWTO Tourism Highlights, 2013 Edition.* (pg. 2.)
[14] Canadian Tourism Commission. (May 2015) Tourism as Canada's Growth Engine; 2014 Annual Report.
[15] Canadian Tourism Commission, Statistics Canada, International Travel Survey, Tourism Snapshot, 2014.
[16] Ibid
[17] Canadian Tourism Commission. (May 2015) Tourism Industry Fact Sheet.

(RevPAR) was $88.21 (+3.7%), with PEI (+12.1%, $62.34) posting the largest growth, followed by BC (+9.9%, $89.90) and Quebec (+8.7%, $94.69).[18]

Figure 4: Overnight Trips to Canada 2014[19]

	Jan. - Oct. 2014	Year-to-date % Change
United States		
Automobile	6,029,817	-1.3
Air	3,518,028	7.6
Other	1,186,589	-6.3
US Total	**10,734,434**	**0.9**
Core Markets		
UK	604,099	5.0
France	432,550	4.9
Germany	301,994	6.0
Australia	242,494	5.7
Core Total	**1,581,137**	**5.3**
Asia/Latin America Markets¹		
Japan	231,047	14.7
South Korea	144,845	13.1
Mexico	151,494	14.8
Brazil	85,101	5.5
China	405,785	29.9
India	154,314	20.0
Asia/Latin America Markets Total	**1,172,586**	**19.3**
Overseas Key Markets	**2,753,723**	**10.8**
Total 11 CTC Markets	**13,488,157**	**2.7**
Other Overseas Countries	1,698,853	7.8
Non-US Countries	4,452,576	9.6
Total Countries	**15,187,010**	**3.3**

From January to December 2014, overall outbound trips by Canadians grew 1.5% to 33.5 million trips as travel to overseas destinations (+9.6%) more than offset decreases in the number of trips to US destinations (-1.8%).[20]

[18] IBID, p. 9
[19] Canadian Tourism Commission, Statistics Canada, International Travel Survey, Tourism Snapshot, 2014.
[20] IBID, p, 8

Figure 5: Overnight Trips by Canadians - 2014

	Jan. - Oct. 2014	Year-to-date % Change
United States	19,835,134	-1.6
Other Countries	8,923,748	9.1
Total Trips from Canada	28,758,882	1.5

Despite the decline, the US remains Canada's top source markets accounting for 19% of total US outbound visitation, a decline of about 4 million since 2002. Twelve states consistently generate more than 70% of total US overnight visitation to Canada and 67% of all US visitor spending within Canada. Only four of those states (i.e., Michigan, Minnesota, New York and Washington) are border-states, debunking the myth that most US travel is of the short-stay, low-spend variety.[21] The Western Hemisphere Travel Initiative also prompted a significant increase in the number of US citizens carrying passports, increasing from less than 20% in 2000 to almost 40% in 2013. By comparison, some 70% of Canadian citizens carry valid passports according to Passport Canada's 2012-2013 Annual Report. However, despite a 12% increase in population between 2000 and 2013, and the 46% of American citizens carrying a passport[22], the number of international outbound travellers from the United States has not increased in 14 years.[23]

Globally, Canada continues to excel in brand recognition. Ranked as the No. 1 country for overall reputation in the world,[24] the FutureBrand's Country Brand Index also rated Canada as the #2 country brand in 2012[25], and #1 in 2010 and 2011[26] yet it is not translating into the visitation numbers industry would like.

Provincially, Newfoundland and Labrador received approximately 507,900 non-resident visitors from January 1 to December 31, 2014, representing an increase of 2% over 2013. Associated expenditures are estimated to have reached $491.1 million, a 5.2% increase over 2013. [27]

A continuing trend saw increased passenger levels at the province's seven major airports in 2014 as airlines increased their non-stop seat capacity and extended many of their services to the province. Non-resident air travel, which represents the largest segment of NL tourism air market – increased by 6% over 2013 levels to an estimated 388,400 visitors. Expenditures for non-resident air visitors are estimated to have reached $401.6 million, up 7.9% over 2013.

Another continuing trend is the decline in non-resident auto traffic. 2014 is the fifth year in a row where non-resident auto traffic decreased, with overall visitation declining 7.3% compared to the year before. Declines were realized in most auto markets during 2014: Maritimes -5.2%, Ontario -11.6%, Quebec -0.6%, other Canada -6.4% and the United States -9.8%. Spending by auto visitors registered a decrease

[21] Tourism Industry Association of Canada. (2014) Gateway to Growth: Canadian Tourism Industry Annual Report.

[22] Canadian Tourism Commission. (2014). A presentation by Jon Mamela, at the TIABC tourism conference, Vancouver, BC.

[23] Tourism Industry Association of Canada. (2014). Gateway to Growth: Canadian Tourism Industry Annual Report.

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

[25] Future Brand Index. (2013). http://www.futurebrand.com/news/futurebrand-launches-the-8th-annual-country-brand-index

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

[27] Government of Newfoundland Labrador (2015, Mar.) *Year-End Provincial Tourism Performance 2014, March.* Document provided by the NL Department of Business, Tourism, Culture and Rural Development.

of 5.4% to $87.1 million. This can be attributed to high gasoline prices, perceived high ferry costs, time pressures and increases in air capacity.

Table 2: Summary Estimates of Non-Resident Tourism Visitation and Expenditures[28]

Mode	2013		2014		Percent Change	
	Visitors	Expenditures $M	Visitors	Expenditures $M	Visitors	Expenditures $M
Auto	99,900	$92.2	92,600	$87.1	-7.3	-5.4
Air	367,200	$372.5	388,499	$401.6	5.8	7.9
Cruise	30,800	$2.7	26,800	$2.4	-13.0	-11.1
Total	497,900	$467.4	507,900	$491.1	2.0	5.2
Source: Department of Business, Tourism, Culture and Rural Development, Tourism Research Division. Note: Based on results from the 2001 Newfoundland and Labrador Air and Auto Exit Survey Program and annual Travel Indicator Program, data subject to revisions.						

Table 3: Roofed Accommodation Occupancy by Region[29]

Region	2013	2014	Point Change	Average Daily Rate
Province	51.6	51.0	-0.6	$133.39 (+4.4%)
Avalon	66.3	62.8	-3.5	$144.72 (+4.8%)
Eastern	36.7	41.4	4.7	$118.80 (+1.2%)
Central	41.0	40.2	-0.8	$120.86 (+8.7%
Western	39.0	40.5	1.5	119.14 (+2.0%)
Labrador	61.2	56.4	-4.8	132.75 (+4.1%)

In terms of accommodation statistics, roofed accommodation performance decreased slightly during 2014. Occupancy rates on a provincial level reached 51.0%, a decrease of 0.6 percentage points over 2013's 51.6%.[30] Performance was mixed at the regional level, with increases in Eastern (4.7 points) and Western regions (1.5 points) leading the province. Occupancy rates on the Avalon Peninsula decreased -3.5 points, in the Central region -0.8 points and in Labrador region -4.8 points.

Average daily room rates were up, with the provincial average daily rate increasing 4.4% to $133. At 8.7%, the Central region recorded that highest increase in average daily rates compared to other regions. Rate increases were more moderate in the Eastern region (+1.2%) and the Western region (+2.0%) and surpassed 4% in both the Avalon region and Labrador region.[31]

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[28] Government of Newfoundland Labrador (2015, Mar.) *Year-End Provincial Tourism Performance 2014, March.* Document provided by the NL Department of Business, Tourism, Culture and Rural Development.

[29] IBID, p. 3

[30] Occupancy rate: This is the total number of rooms/units sold divided by the total number of rooms/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.

[31] Government of Newfoundland Labrador (2015, Mar.) *Year-End Provincial Tourism Performance 2014, March.* Document provided by the NL Department of Business, Tourism, Culture and Rural Development.

Cruise Newfoundland and Labrador numbers indicate that the province received approximately 26,800 unique[32] cruise visitors during the 2014 cruise season. This performance follows the record of 39,100 unique visitors set in the 2012 cruise season and represents the fourth highest level ever achieved since record keeping started in 1998. During the 2014 cruise season, the province was experiencing a trend towards smaller expedition ships, which fit well with the nature and scale of our destination.

Overall **Marine Atlantic** passenger movements between Newfoundland and Nova Scotia reached 307,257 for the period ending December 2014, a decrease of 6.7% over 2013 levels (-23% over the past 3 years), while the number of passenger related vehicles decreased 5.7% during the same period. The annual service between Port Aux Basques and North Sydney registered 1,530 crossings, 127 fewer than in the previous year, resulting in 282,263 passenger movements (-9.2%) and 99,014 passenger related vehicles movements (-8.6%).

Compared to 2013, traffic on the Labrador Straits ferry between the Island portion at St. Barbe and Labrador decreased during the May to October 2014 period. Specifically, the number of passengers and passenger related vehicles (both directions) declined 4% and 5% respectively.

The seasonal service (June to September) between Argentia and North Sydney registered 76 crossings, 16 more than in the previous season, resulting in 24,994 passenger movements and 11,011 passenger related vehicle movements, increasing 35.0% and 32.6% respectively compared to 2013. More crossings at Argentia during 2014 were due in part to significant decreases in the number of crossings the previous season when damage sustained by the MV Blue Puttees in August resulted in the cancellation of the service at Argentia for several weeks.

The number of camping units registered at the province’s system of Provincial Parks reached 62,913 during the 2014 camping season, a decrease of 4.5% compared to 2013 levels. Camping activity attributed to residents of the province decreased 5% for the 2014 operating season while camping attributed to non-residents declined 3%.

Camping activity increased 7.8% at **Gros Morne National Park** for the operating period ending 31 October, 2014 while the number of visitors recorded at the Western Brook Pond Boat Tour increased 4% over 2013 levels and the number of visitors reported at the Lobster Cove Lighthouse increased 1%.

The number of visitors reported at the Visitor Centre, Discovery Centre, Broom Point and the pool decreased 18%, 1%, 11% and 23% respectively compared to the same period last year while the number of bus tours visiting Gros Morne for the period ending October 2014 decreased 7% over 2013, with the number of bus tour passengers declining 11%.

Visits to **National Historic Sites** were down 13.5% for the operating season ending October 2014. All sites with the exception of the Port au Choix and the Ryan Premises reported a decrease in the number of visitors received during the 2014 operating season. Visitor decreases were reported at Castle Hill (-9%), L’ Anse Aux Meadows (-5%), Hawthorne Cottage (-9%), Signal Hill (Cabot Tower -27%), the Cape Spear Visitor Centre (-2%) and Red Bay (-11%) while Port au Choix and the Ryan Premises reported increases of 4% and 0.2% respectively.

UNPRECEDENTED CHOICE

Travellers continue to have unprecedented choice in their travel options domestically and internationally. A coordinated approach among all layers of government and industry at the national, provincial, regional and community level is essential to optimizing limited resources designed to increase the volume and yield from the traveller. The Newfoundland and Labrador Tourism Board, a public private partnership of industry and government, is well positioned to find efficiencies in this optimization as they continue to

[32] Unique cruise visitors is BTCRD’s 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 whereby passengers are counted at every port call.

work towards implementing the provincial strategic plan, *Uncommon Potential: A Vision for Newfoundland and Labrador Tourism (Vision 2020).* With the TDVAA process in various stages in all five regions and the Opportunity Management implementation process underway in Eastern and Labrador, enhancements to competitiveness and appeal are already being achieved.

In Newfoundland and Labrador, over $100 million has been invested in provincial marketing since 2006 and the Find Yourself Campaign has garnered 227 awards since 2006 and created strong brand awareness for the province.[33] Yet, attracting new visitation remains a challenge for Canada and NL alike. Countries like the USA, for example, are investing on their Brand USA campaign to lure Canadians south of the border. In 2013, the Canadian Tourism Commission saw its marketing budget cut by 20% to $58.8M however in 2015 the CTC budget will hopefully increase as both public and private sector investments will be pooled to re-enter the US marketplace with leisure market advertising. This will be essential if we are to regain valuable US based business.

Finally, the **talent gap** continues to be a major challenge facing the tourism industry in Newfoundland[34] and across Canada.[35] [36] As demand for tourism increases, availability of skilled labour decreases, so the region could struggle in realizing its full potential into the future.

Coping strategies to avoid the negative impacts from labour realities will include reduced hours, shortened operating seasons, sharing staff, 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 and consider retirees as part of a refocused investment to ensure the actual experience lived by the traveller matches the perception that is in marketplace and promoted by the provincial marketing campaigns.

To be competitive, Western Newfoundland 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 Labradorians.

4.2 Data Insights

There are five dimensions to the TDVAA (Table 4). It's important to note that the categorization is not absolute; rather it is based on a review of the data, discussion with Western Newfoundland and conclusions reached. Each dimension first presents the summary statement, 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 4: High Level Summary of the Key Assessment Dimensions

1. Reports, Plans and Studies Dimension			Yes	Almost	No
Existing	Existing information	EI1 Depth of reports, plans, studies	X		

[33] Government of Newfoundland and Labrador, Department of Business, Tourism, Culture and Rural Development, Dec. 2014

[34] 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.

[35] 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

[36] 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

1. Reports, Plans and Studies Dimension			Yes	Almost	No
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		
	Psychographic research	VP2 Depth of psychographic info on visitors		X	
	Satisfaction & exist surveys	VP3 Produces satisfaction & exit surveys	X		
Customer Engagement	Website and social media links	CE1 Municipal websites with essential info			X
		CE2 Destination websites with essential info	X		
		CE3 Tourism Operators with essential info	X		
	TripAdvisor	CE4 Municipalities with TripAdvisor accounts			X
		CE5 Destination with TripAdvisor accounts			X
		CE6 Tourism Operators with TripAdvisor accounts		X	
	Facebook	CE7 Municipalities with Facebook Accounts			X
		CE8 Destination with Facebook Accounts			X
		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					
Assets & Attributes		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	X
		HR2	Region promoting tourism as a viable career option		X	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	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	BTCRD, HNL, NG and support from 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]

The Western region has long been recognized as a primary tourism destination for the province. Blessed with natural beauty and a long list of appealing tourism attractors, including two UNESCO designated sites, the region has leveraged this attractiveness by undertaking a variety of studies designed to help develop, manage and grow the destination's attractiveness. These studies have been initiated by various organizations including the province, the DMO, sub-regions, tourism organizations, sector associations as well as any number of operator and community groups. The collection of this work and the resulting actions have certainly helped shape what the destination is today and will be into the future.

A total of 263 documents were captured in the secondary data review for the Western region. While each document offers any number of specific recommendations impacting the regions tourism prospects, the purpose of this review was to capture those specifically relevant to the Western region, plus examine the provincial, national and international for relevance.

- 15 International documents reviewed
- 64 National documents reviewed
- 108 Provincial documents reviewed
- 38 Western Community/Business
- 19 Western Region Documents/Reports
- 11 Western Project in the Pipeline
- 8 Documents brought forward from the Labrador TDVAA

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; and
- Trends.

As well, there were multiple ferry, airline and cruise schedules reviewed plus data tables from Tourism Destination Management System (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 tourism projects that are in the concept or development stage, application for funding stage, or approval stage that will bring a valuable provincial, regional or community contribution to tourism. Requests were made for information on any projects within the past five years (2009-2013). Table 5 lists a sample of projects identified as offering future tourism potential for Western Newfoundland.

Table 5: A Sample of Projects in the Pipeline Offering Tourism Potential

Project Identification, Area or Organization	Brief Description
Isle aux Morts Destination Development Plan	A unique concept and positioning for this rural community through a Newfoundland Dog Museum and Harvey Sea Interpretation Centre. The destination development plan was completed May 2014.
Port aux Basques Downtown Business Development	Downtown business development – various proposed activities to beautify and embrace visitation and commerce.
Stephenville – Cultural Destinations	The Town of Stephenville Cultural Heritage Committee is currently involved in a strategic planning process to identify activities and events for their 50th anniversary of the closure of the Harmon Air Force Base in Stephenville in 2016. The intention is to position the area as a cultural tourism destination legacy to the Mi'kmaq, French, English, and American influences found in the area.
Tourism Development Qalipu	The Qalipu Mi'kmaq First Nation are embarking on a strategy for tourism development directly involving their people and culture.
Steady Brook - Beautification	There is a town plan that incorporates local/citizen and visitor values (as well as new Marble Mountain development concepts).
Marble Mountain	New chairlift due to lightning event and the Master Plan for Land Based Development.
Deer Lake Snowmobile HUB	Deer Lake snowmobile hub initiative aims to position the area as an important HUB of snowmobile friendly activity in, Western Newfoundland (whether it be for groomed or backcountry riding), entering a third phase of development organizers are further engaging the business community to become involved in this development.
Creative Gros Morne	Renewed funding commitment to support continued cultural visitor experience development in the Gros Morne area.
Rocky Harbour - Beautification	A plan to enhance the appearance and appeal of the main street shoreline and infrastructure in the heart of Rocky Harbour including a new development with retail and artisan spaces.
Theatre Newfoundland Labrador Expansion in Cow Head	Plans to expand the current theatre and programming infrastructure, their length of operating season to increase visitor length of stay, spending and yield.
Port of St. Barbe Development	A beautification / community enhancement / visitor friendly welcome project for St. Barbe as a key ferry arrival destination and gateway to the region.
STEP Vinland	A process involving ACOA and BTCRD, the Town of St. Anthony and surrounds. Innovative, comprehensive, experience development tourism program – designed or created to help communities succeed in tourism.

KEY FINDINGS

- Several communities have well developed community/development/strategic direction plans that incorporate the role of tourism. Examples include: Port aux Basques Downtown Study,[37] the Rocky Harbour Sustainability Plan[38] and the Corner Brook Integrated Sustainability Plan[39];
- The southern half of the region has invested in plans and studies that explore where they can develop their community and tourism potential.[40] In small communities, the integration of benefits to the citizens and the traveller alike with investments is important;
- The recreational cycling/mountain biking trail potential emerges[41] as a key focal point for product development that complements the community but could emerge as a tourism draw (currently, no submissions before funders);
- The concept of destination trails[42] in the Roddickton area proposes two pilot projects for heritage trail development that meets the Atlantic Canada Trail Association standards and have the potential to become destination trails: French Shore Trail ($281,220) and the Underground Salmon Pool Trail ($93,270).[43] The trail identified with the third most potential can be considered at a later time (Barr'd Island Trail at a cost of $91,980);
- Evidence of the strength of the GMNP region is found in many source documents. The net sum of 'unique attributes' south of Deer Lake however, poses some interesting possibilities for creating a journey for connecting with the lesser known aspects of Western NL – from the Newfoundland Dog, Lighthouses, to the Military History, French and Qalipu Culture, and the transportation links to the mainland, as well as the traditional fishing history and heritage found in the southern part of the region;
- In 2007, the IBRD Team for Zones 6 and 7 identified 26 high-priority product development projects[44] and after an internal review with BTCRD[45] it was revealed that many of these projects were acted on and completed, several are no longer relevant, and a few remain as potential long-term opportunities;
- Seeking an additional designation for the Cabox Geopark, or a similar geological itinerary, would add additional strength to the existing reputation of GMNP and Western NL given the assets found here would complement those found in relation to GMNP's. "The creation of a Global Geopark spanning the Lewis Hills, Blow-Me-Down Mountains, North Arm Hills and Tablelands can contribute to the ecological and economic sustainability of Western Newfoundland, while honouring the natural and cultural heritage on the world stage. It can also add significantly to the establishment of *Western Newfoundland as the geographic and administrative centre of a North Atlantic*

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[37] CBLC Limited. (2012, December). *Channel-Port aux Basques: Downtown design study.* Final report. Retrieved from: http://www.portauxbasques.ca/images/downtown_design_study.pdf.

[38] Atlantic Engineering Consultants Ltd. (2010, March). *Rocky Harbour integrated community sustainability plan.* Retrieved from: http://www.rockyharbour.ca/pdf/rh_icsp.pdf.

[39] City of Cornerbrook. (2012). *Future Corner Brook: Integrated municipal sustainability plan 2012.* Retrieved from: http://www.cornerbrook.com/images/CityHall/Development%20and%20Planning/IMSP%20AND%20DEVELOPMENT%20REGULATIONS%202012/CB_IMSP_web_.pdf.

[40] Examples: Isle aux Morts destination development plan and Port-aux-Basque downtown revitalization plan.

[41] Examples: Corner Brook Recreational Trails Master plan and Gros Morne National Park Mountain Bicycling Trail Report.

[42] The Atlantic Canada Trail Association (ACT) defines a destination trail as a major tourism attraction that is an economic revenue generator. It is generally in a distinctive landscape and reflects a regions most distinguishing characteristics such as views, natural features, culture or heritage. Aside from the "wow" factor that a destination trail offers, it also has high quality standards of design, maintenance and amenities and has trained knowledgeable staff and volunteers supporting it.

[43] Green Leaf Resources (2013, December). *Northern Peninsula east heritage corridor: Trail development recommendations.* Document provided by the Western Destination Marketing Organization.

[44] Innovation Trade and Rural Development, Western Region. (2007, January). *Product development opportunities: Northern peninsula zone 6 and 7.* Document provided by the Western Destination Marketing Organization.

[45] Written responses from Carolyn Lavers and Paul Taylor – BTCRD, Sept. 2014

eco and adventure tourism industry extending from Eastern North America to Western Europe. And it can do so at relatively low cost (estimated at $250,000 annually) and without the legislative requirements, bureaucratic complexities, and land use restrictions (for example hunting, fishing, domestic wood cutting and snowmobiling) of other high-level designations."[46]

- The Isle aux Morts Destination Development project represents a significant opportunity for growing tourism on the south shore and creating a reason for those arriving by ferry from Nova Scotia in Port aux Basques (or those exiting from the island via ferry) to spend time and money in the area. A comprehensive development plan was undertaken in September 2009 and presents a compelling case for capitalizing on the history and beauty of this area. The story of the Harvey family and their Newfoundland dog is at the heart of the experience. To capitalize on the strength of the breed recognition and affinity could translate into increased visitation, yield, packaged opportunities and longer stays. *"What sets Isle aux Morts or "Island of the Dead" apart from other Newfoundland communities is a remarkable story of bravery and kindness exhibited by a family (George, Tom and Ann Harvey) and their Newfoundland dog "Hairyman" in 1828. The family rescued 163 people from the sunken brig, the Despatch bound for Quebec City."*[47]
- The UNESCO designation in Red Bay, southern Labrador, has positive implications for the Western region. The "region" now has three designations, all within 350 km of each other, which includes a ferry ride across from the island of Newfoundland to Labrador. Expanding the traveller's journey beyond GMNP, L'Anse aux Meadows NHS and then onto Red Bay NHS will create an added reason for people to spend more time in the region. Successful implementation of the Strategic Tourism Expansion Plan (STEP Vinland) has potential to strengthen the resultant yield;
- On the Southwest Coast, private sector operators are exploring the concept of developing a business network to further develop and market the potential for ATV, motor cycle and snowmobile adventures for the Southwest Coast of the province. This would ensure standards are followed to provide the best adventure tourism packages possible for the region;
- Opportunities exist for "fly and ride" back-country snowmobiling with the three airports in Western Newfoundland in Stephenville, Deer Lake and St. Anthony;
- The Gravels Development Committee, in Port au Port West, is positioning their location as a key location for summer weddings. They have just finished major renovations to a community center and now cater to weddings; usually from people living away. While in the area they tour the Our Lady of Mercy complex and walk the gravels walking trail;
- Marine Atlantic has invested approximately $32M dollars this past year in significant upgrades at all three terminals (PAB, ARG, North Sydney) to provide the best service possible for their customers, these include renovations at Port aux Basques terminal with upgrades and customer amenities including a commercial drivers' seating lounge, digital signage and customer-friendly way finding signage and tourism-related murals. The brand new North Sydney NS Terminal, expected to open in March 2015, will be modern, efficient, and environmentally friendly[48];
- Tourism levies are a source of constant funding in geographical pockets throughout the Western region, including the Gros More Co-operating Association (GMCA), the Viking Trail Tourism Association (VTTA), and the Tourism Southwest Association (TSW)[49];
- Corner Brook hoteliers have an MOU (2013) with the City of Corner Brook that is

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[46] International Appalachian Trail Newfoundland & Labrador. (2014, January). *Cabox Global Geopark: On the Galapagos of plate tectonics.* Document provided by the Western Destination Marketing Organization.

[47] The Glen Group Ltd., Forerunner Creative, Tourism Strategies Ltd. (Sept. 2009). Isle of Morts Destination Development Plan. Document provided by the Western Destination Marketing Organization.

[48] Rose, V. (2015, 5). Personal email communication. Response to a request for detailed upgrade information.

[49] Newfoundland and Labrador Tourism Board. (2013, March). *Tourism levy briefing note.* Document provided by the Western Destination Marketing Organization.

pending approval in the house of assembly, to amend the Corner Brook Act and allow for the introduction of a levy to provide additional funds for tourism development;

- There is an emerging sentiment among Humber Valley area stakeholders (Steady Brook to Deer Lake) that short of collecting a levy, stakeholders should work together more closely and possibly fund tourism development related outcomes through cooperative programs;
- The Blow Me Down Cross Country Ski Club had a proposal in the system around 2009-2010 including clubhouse, trails, and other increased capacity development outcomes. They hosted the Nationals in 2014, such development could offer potential to further strengthen a winter season invite to resident and non-resident visitors; and
- The cruise industry is on the rise in Western Newfoundland. There is increased interest in ports of call in Western and planning groups are responding in line with the demand.

Implications/Considerations

- Although there is currently a provincial moratorium on hydraulic fracturing (aka. fracking), concerning issues related to the Gros Morne National Park and Bay St. George areas in particular remain. There is concern the UNESCO designation for the park and the potential negative impacts for the tourism industry as a key economic generator that has helped replace losses from the traditional fishing economy along the west coast of NL are at risk.[50]
- Other Land Use Industrialization: Transmission Line (Muskrat Falls), quarrying, forest harvesting, view scape management all remain development factors for operators, municipalities and regions in Western Newfoundland as they could impact the region’s appeal and competitiveness.
- There are a number of projects in the pipeline; several that warrant ongoing focus. Emphasis should be given to those projects that help develop the appeal of the entire Western region, thus encouraging visitors to stay longer, or return again because there are demand generators in the north, central and southern parts of Western NL.

[50] Matthews, M. (2013, September). *C-NLOPB draft Western NL offshore area strategic environmental assessment update report.*

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: BTCRD, HNL, WDMO
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; where the sample size is sufficient, a regional segmentation is extrapolated. The volume of research on non-resident travellers (representing 10% of travel activity) is substantially higher than for resident travellers that represents 90% of travel activity (Table 6).

Table 6: 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	999.7 M
Percent of Tourism Spending	58%	42%	
Per Person Avg. Spending	$141.23	$923.55	

Source: Tourism Vision Evaluation Annual Report 2012[51], p. 3.

A research presentation of the Canadian Travel Market based on a new BTCRD Non-resident Travel Attitudes and Motivations study (Nov 2013) revealed characteristics of the Canadian travel market[52];

[51] 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.

- 82% of vacation visitors to NL in May to October are Canadians;
- 71% of Canadian travellers had never visited NL;
- 50% of Canadian travellers have a minimum of a university degree and 29% have incomes greater than $100,000 (which often is associated with ability to pay);
- 47% of Canadian travellers are looking for travel bargains, 53% make travel plans in advance and 24% take several short vacations only;
- 27% of Canadian travellers take one or two long vacations, 32% vacation year-round;
- 15% of Canadian travellers 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, St. John's and Gros Morne.

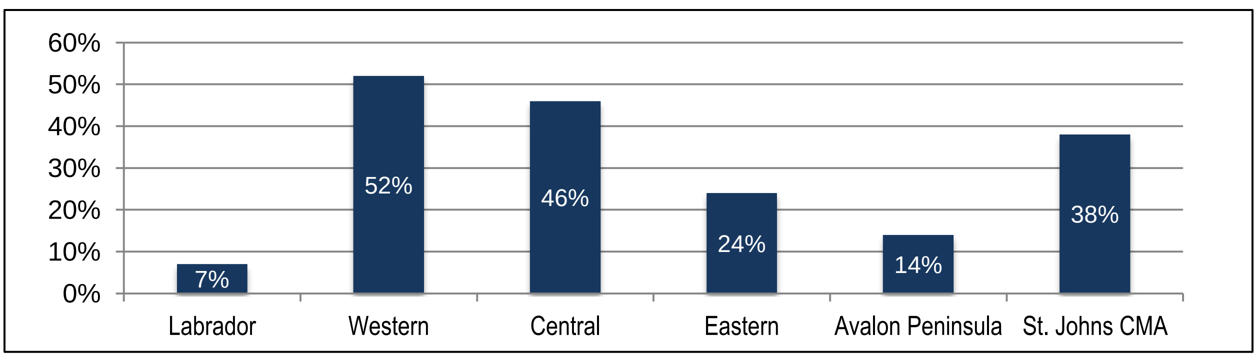
Exit surveys and key reports are published on a regular schedule; the frequency, however, has been impacted by budget cutbacks. A sample of the range of reports include:

- BTCRD published research on information about visitor satisfaction levels can be found in several reports;
- 2012 Tourism Vision Annual Report;
- 2014 Newfoundland and Labrador Tourism Performance 2013; and
- 2012 Gros Morne & Port au Choix Visitor Analyses, and the 2013 Visitor Analysis for Red Bay and L'Anse aux Meadows.

KEY FINDINGS

- In terms of tourism performance and perhaps popularity, the Western region has the highest resident visitation with 52% of travellers taking at least one trip over the past two years.53 Central is a close second, with 46% of travellers, followed by St. John's at 38%, Eastern at 24%, the Avalon Peninsula at 14% and Labrador at 7% (Figure 6).[54]

Figure 6: Percent of Resident Travel Visitors to Regions in NL (2008-2009)



- 38% of all travel parties visited and stayed at least one overnight in the Western Region. Of these visitors 35% were from Ontario, 23% the Maritimes, 22% other Canada, 11% the USA, 6% Quebec and 5% overseas. The average length of stay was six nights for overnight visitors. 55% were vacation/pleasure travellers, 31% VFR, 30%

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

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

[54] 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.

travelled alone, 39% were couples with no children. Scenic touring (74%) and pleasure walking in/around communities (70%) were the most popular activities. 50% were aged 55 and older, with 46% having an average annual household income of $100,000+.[55]

- The key travel experience and emotional connections Canadian travellers are looking for in an NL vacation (as revealed in the TCR Non-Resident Travel Attitudes and Motivations Study, Nov 2013) align with the travel opportunities available in the Western region according to the WDMO. The region offers ocean adventures, ocean/coastlines, whale-watching, icebergs, local culture, GMNP, three UNESCO sites (including southern Labrador's Red Bay), miles of coastal routes, and tourism operators creating the ability for travellers to tour the region with ease and connect with local businesses;
- There is limited psychographic information specifically on visitors to the Western Region to help create a visitor profile for the DMO and their operators;
- 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 to understand the travel attitudes and motivations of visitors between Labrador and the Western Regions; and
- During the preliminary stakeholder consultations, the WDMO and operators in the region expressed a desire to have relevant psychographic information about resident and non-resident travellers to the region. This is due in part to the higher than average level of sophistication among some operators when it comes to informing their product development and marketing strategies.

IMPLICATIONS/CONSIDERATIONS

- Understanding changing travel motivations, attitudes and values of resident and non-resident travellers to the Western region will be important to guide future tourism development and refresh tourism products and experiences in order to attract new and repeat visitation;
- 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; and
- The anticipated growth in popularity in Labrador, due to the designation of Red Bay NHS and development of the Trans Labrador Highway (which could bring visitation in from Quebec and down to the island in time), is reason to focus on forming partnerships for product development and enhancing the driving experience along the Viking Trail through to Red Bay NHS and UNESCO World Heritage Site.

[55] Government of Newfoundland & Labrador (2011). *2011 Exit survey profile of non-residents visiting the western region (economic zones 6 – 10).* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit_Survey_Visitors_to_Western_Region.pdf

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, through a visitor lens, the research attempted to determine if these organizations were easily found online and the level of engagement and conversation occurring with current, past or potential visitors could be substantiated.

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. [YES]

CE4 Municipalities have TripAdvisor accounts. [NO]

CE5 Destination organizations have TripAdvisor account. [NO]

CE6 Tourism operators have TripAdvisor accounts. [ALMOST]

CE7 The municipalities have Facebook accounts. [NO]

CE8 The destination organizations have Facebook accounts. [NO]

CE9 Tourism operators have Facebook accounts. [ALMOST]

Table 7: Municipal & Destination Website Summary

Website Summary	Municipalities		Destination Websites	
	Number in Western Region	% with Websites	Number in Western Region	% of total with Websites
Total number of towns/cities in the region	61	67% (n=41)		
Total number of unincorporated towns in the region	0	0		
Total number of websites in region (incorporated and unincorporated) with a basic tourism section	25	41%		
Total number of destination websites[56]			3	100%
Of those 61 municipal and 10 regional organizations with websites that have tourism information				
Have visitor testimonials posted on their website	1	2%	0	--
Post photos of visitors engaged in the activity/experience	17	41%	3	100%
Post photos of the location or infrastructure	41	100%	3	100%
Post tourism related videos of visitors engaged in the experience	3	7%	2	67%
Post videos of the location or infrastructure	4	10%	2	67%
Have a tourism booking call to action on websites	19	46%	1	33%
Have ‘how to get here’ visitor information on website	36	88%	2	67%
Accept phone/email reservations for tourism booking	0	--	0	--
Accept online reservations for tourism bookings	0	--	0	--
Sign up for a tourism e-newsletter sign up option	3	7%	2	67%
Have a contact page for the travel trade	0	--	0	--
Have a destination/city/town tourism blog	2	5%	1	33%
Have a link referring guests to their TripAdvisor Account	0	--	0	--

[56] The GMCA operates two regional websites. Their main site: www.visitgrosmorne.com and www.creativegrosmorne.com, one serving general tourism, the other cultural tourism. The 3rd is www.vikingtrail.com

Table 8: Tourism Operators Online Summary Activity

Total Assets by Sector	Number of Assets	Percentage with Websites	Percentage with Trip Advisor	Percentage with Facebook
RV & Campgrounds	32	75%	31%	34%
Roofed Accommodations	277	79%	46%	40%
Culture and Heritage Based Assets	83	86%	41%	49%
Nature Based Assets	76	72%	7%	26%
Trails and Routes	150	93%	14%	18%
Man-Made Attractions	17	94%	53%	76%
Activity Based Business	39	85%	46%	67%
Outfitter Businesses	66	91%	2%	32%
Program Based Assets	29	21%	7%	14%
Festivals and Events	66	68%	5%	44%

Note: 66 outfitting businesses were identified as active and operational; many with multiple sites to take their guests (for example Cloud River Outfitters has five sites identified in TDMS). The total number of sites listed for the 66 businesses is 158. An additional 13 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 9: 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	32	24	5	11	21	8	5	2	18	18	8	18	4	0	0	0
Roofed Accommodations	277	219	59	94	203	57	21	124	162	211	52	246	1	8	12	11
Culture and Heritage Based Assets	83	71	4	25	53	12	7	9	52	17	4	23	8	5	2	1
Nature Based Assets	76	55	3	25	28	21	4	12	41	26	3	17	2	0	0	1
Trails and Routes	150	139	7	36	74	6	9	5	115	22	0	16	17	26	2	1
Man-Made Attractions	17	16	0	10	15	8	4	1	13	11	3	14	4	5	3	0
Activity Based Businesses	39	33	13	27	32	0	0	10	29	31	7	28	5	2	5	2
Outfitter Businesses	66	60	31	56	43	7	4	28	50	58	2	13	0	0	2	0
Program Based Businesses	29	6	3	1	5	1	2	1	1	5	1	3	0	3	1	0
Festivals and Events	66	45	5	23	26	6	5	21	19	19	1	12	1	0	0	0
Totals	835	668	130	308	500	126	61	213	500	418	81	390	42	49	27	16
Percentage*		80%	19%	46%	75%	19%	9%	32%	75%	63%	12%	58%	6%	7%	4%	2%
*Of those with a website																

Table 10: Municipal & Destination TripAdvisor Summary

% are of those with a TripAdvisor Account	**Municipalities**		**Destination**	
	Number	% of total	Number	% of total
# with a TripAdvisor Account	3	5%	0	--
# of Hotels/Accommodations listed	5		0	
# of Restaurants listed	62		0	
# Attractions/Things to Do listed	21		0	
Never respond with a comment to guests (1/0)	0	--	0	--
Respond to a guest reviews <50% of the time (1/0)	0	--	0	--
Respond to a guest reviews >50% of the time (1/0)	0	--	0	--

Table 11: Municipal & Destination Facebook Summary

% are of those with a Facebook Account	**Municipalities**		**Destination**	
	Number	% of total	Number	% of total
# with a Facebook Account	25	41%	2	66%
# of likes	4,304		2,665	
#of people talking	270		166	
# Visitors were here	3,253		0	
Link to their TripAdvisor account	0	--	0	--
Link to Google map	0	--	2	100%
Have a link referring guests to their YouTube account	0	--	1	50%
Have direct links to companies sales pages	0	--	0	--
Have a booking engine for businesses	0	--	0	--
Accept credit card payments	0	--	0	--

Table 12: 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	32	10	297	137	0	3-5	7	8	3	0
Roofed Accommodations	277	128	2,770	1,022	53	2.5-5	44	109	56	3
Culture and Heritage Based Assets	83	34	553	307	8	3-5	21	0	21	0
Nature Based Assets	76	5	1,341	559	0	4.5-5	0	9	1	0
Trails and Routes	150	21	1,465	440	9	1-4.5	1	149	0	0
Man-Made Attractions	17	9	115	61	7	2-5	9	0	9	0
Activity Based Businesses	39	18	366	209	55	2-5	12	11	15	0
Outfitter Businesses	66	1	36	15	8	4.5	1	0	1	0
Program Based Businesses	29	2	60	14	1	5	0	0	0	0
Festivals and Events	66	3	123	22	1	3-5	0	41	0	0
Totals	835	231	7126	2786	142	2-5	95	327	106	3
Percentage *		28%			61%		41%		46%	1%

* Of those with a TripAdvisor account

Table 13: 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	32	11	2441	6	20702	7	0	8	3	0	9	2	0
Roofed Accommodations	277	110	30287	440	9602	122	8	19	14	2	79	12	6
Culture and Heritage Based Assets	83	41	18554	1536	1025	178	4	15	17	0	40	20	7
Nature Based Assets	76	20	16571	123	3265	40	0	11	9	2	16	4	1
Trails and Routes	150	27	19796	116	635	118	1	0	2	2	26	25	2
Man-Made Attractions	17	13	14901	156	10004	22	0	3	7	3	13	2	2
Activity Based Businesses	39	26	44327	9771	264	214	6	23	9	0	26	14	2
Outfitter Businesses	66	21	21958	477	89	12	0	8	0	1	19	12	0
Program Based Businesses	29	4	702	11	2	23	0	2	3	3	4	2	0
Festivals and Events	66	29	8687	317	66	151	1	1	14	2	22	9	1
Totals	835	302	178224	12953	45654	887	20	90	78	15	254	102	21
Percentage *		36%					7%	30%	26%	5%	84%	34%	7%
* Of those with a Facebook account													

Key Findings

- 41 of 61 (67%) municipalities have a website and of those that have a website 41% have basic visitor information on their site (Table 7);
- 88% of municipalities with websites provide 'how to get here' information and municipalities tend to post more images of infrastructure (Table 7);
- 80% of the 835 operators/businesses within the region have a website; this is higher than Labrador at 62% and 67% in the Eastern region;
- Businesses with websites are well represented across all segments of the industry ranging from 68% to 94% with websites. The single outlier is program-based companies (21%);

- Business websites are high with infrastructure imagery (75%) but only 19% include photos with visitors engaged in experiences. Calls to action are low at 32% of businesses, as is online reservations (12%). Only 19% post visitor testimonials, the majority (75%) include 'how to get there information', and 58% accept credit cards (Table 9);
- There are three destination websites that provide a variety of information that may not be included on the WDMO or provincial websites;
- There are another 10 websites or Facebook pages that have limited degrees of current and out of date visitor information and in most cases are commercial sites that sell web listings and advertising to tourism operators;
- Only 5% of the municipalities, and none of the destination websites have a TripAdvisor account (Table 10). The figures are higher for Facebook with 41% of the municipalities having a Facebook page, and 67% of the destination websites (Table 11);
- 28% of businesses across all sectors take advantage of TripAdvisor, this is less than the Eastern region (31%) but higher than Labrador (11%). On the high end of the spectrum of TripAdvisor users are roofed accommodations (46%), man-made attractions (53%) and activity based assets (46%) with many others being low such as nature based assets (7%), festivals and events (5%), and outfitters (2%);
- The TripAdvisor ratings out of five are the widest (1 to 4.5) for trails and tours, the highest and most consistent for nature based assets (4.5 to 5), the sole outfitter (4.5), and two program businesses (5). Others with a broad range include accommodations (2.5 to 5) and activity based businesses (2 to 5) (Table 12);
- Only 3 businesses who use TripAdvisor have a link to their Facebook page, even though 36% (302) businesses have a Facebook account;
- 36% of businesses have a Facebook account, a small number compared to the popularity of this social media site. Man-made attractions (76%), activity based businesses (67%), culture/heritage based assets (49%) and festivals and events (44%) are the strongest here, the weakest being program-based assets (14%), trails and routes (18%) and nature based assets (26%) (Table 13);
- The activity-based assets and roofed accommodations assets receive the highest number of Facebook "Likes", 44,327 and 30,287 respectively (Table 10); and
- 84% post photos, 34% videos, 30% a link to google maps, and 26% to events (Table 13).

Implications/Considerations

- The strong website presence is positive. Companies that are weak in specific areas should be encouraged to move to the next step in strengthening their sites by adding visitor testimonials, images and videos of visitors engaged in activities over infrastructure and place imagery. Given only 32% of all business have a strong call-to-action, 12% online reservations, 4% a company blog, or 2% a link to their TripAdvisor account, these all represent immediate, short-term opportunities to drive business, strengthen the path-to-purchase, and close the sale;
- There are three recognized destination websites that are providing current and relevant visitor information, but the data search revealed an additional six websites regional sites, and five regional Facebook sites which could potentially confuse travellers. Key to ensuring travellers have the best, most up-to-date information is to ensure all drive visitors to the provincial website, and the search engine optimization for the three destination websites garners top web listing positioning so travellers click on them first;
- Tourism businesses are not fully leveraging the readily available and low cost investment in online tools to grow their business (TripAdvisor, Facebook). This is the next major opportunity for operators to strengthen their online presence and be 'found' where travellers seek information to ensure it is easy for visitors to find the information they are looking for, where they are active online; and
- While online marketing training is available through a number of sources, operators must avail themselves of this training and put in practice the skills taught. This may be

a challenge for smaller businesses as they do not have the time, nor may not understand the value. Therefore, training and supporting implementation must be done with small operators in mind.

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 destination offers a variety for ground transportation services to accommodate visitors that arrive by air and don't have their own personal transportation options. [NO]

IB2: The destination offers a 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 destination offers a variety of water-based amenities to accommodate visitors travelling by watercraft. [NO]

Table 14: Transportation Summary for Western

Transportation Sector	Number servicing the region	Number of service locations	Year round service	High-season service only	6-month of the year service
Airlines'	7	3	4	3	0
Ferry Companies[57]	2	5	2	0	0
Water Taxi[58]	1	2	0	1	0
Car Rental Companies	5	5	5	0	0
RV Rental Companies	1	2	1	0	0
Bus/Coaches[59]	7	11	7	0	0
Taxi/Limousine Companies	17	10	17	0	0
Visitor Rail Access	0	0	0	0	0
Public Transit	1	1	1	0	0

Note 1: Airlines: The two airlines that service high season only are Sunwing (winter service to sun destinations, very little impact on tourism in Western Newfoundland), Air St. Pierre (Stephenville to St. P et M in summer) and Porter (new summer service between Stephenville and Halifax).

Note 2: Gros Morne Outfitter & Tours (http://grosmorneoutfittersandtours.ca/) operates out of Portland Creek in GMNP. There are other charter plane services that bring hunters into the backcountry. These were not included in the numbers.

[57] Ferry Companies: All intra-provincial ferries were counted as one company, even though some routes may be contracted to a different company. All intra-provincial ferry information can be found on one website (http://www.tw.gov.nl.ca/ferryservices/). Also, the ferry service from Rose Blanche – La Poile was counted as one service location, and all services between Burgeo and neighbouring communities (Ramea, Grey River, Francois, etc.) were counted as one service area. Both Marine Atlantic and the intra-provincial ferry services operate year-round (hence the number 2 in that box), but some routes are seasonal. For example, ferry service from Labrador switches from St. Barbe in the summer to Corner Brook in the winter.

[58] Water Taxi's transport foot passengers only, and may provide tour services. Bonne Tours Water Taxi between Norris Point and Woody Point in the summer months

[59] Bus/Coaches: There are 7 operators who provide scheduled services between certain communities, but the network is by no means comprehensive or geared towards the tourism industry. These services are often transporting supplies between communities and offer seats in their vehicles for people travelling. Each company operates independently, has its own contact point, with no centralized system for information, inquiries or reservations; a limitation for visitors who must depend on transportation to visit the region.

Table 15: 2014 Cruise Summary for Western Newfoundland

Cruise Lines	# Ports of Call Visited	Major Cruise Line	Adventure/ Expedition Cruise Line	# Guests for per ship	# Crew for 2014	# Western Region Itineraries in 2014
Adventure Canada: Sea Adventurer	3		✔	110 - 130	72	3
Holland America: Veendam Eurodam	2	✔		1277 2046	602 929	1 1
Linblad Expeditions: National Geographic Explorer	2		✔	152	70	2
Ponant: Le Boreal	1		✔	169	150	1
Oceania: Marina Regatta	2	✔		1184 629	762 395	1 1
Amadea: Phoenix Reisen:	1		✔	568	311	1
Celebrity: Celebrity Summit	1	✔		2101	951	1
Seabourn: Seabourn Quest	1		✔	431	343	1
Plantours Kreuzfahrten: Hamburg	1		✔	363	167	1
Transocean: Astor	2		✔	373	268	1
SilverSea: Silver Whisper	1		✔	364	291	1

Note 1: Cruise NL file: 2014 Cruise NL Final (Master) Revised Nov. 6, 2014.xls

Table 16: Harbours Impacting Tourism

Harbours Impacting Tourism	Location	Meters of Draft	Meters of Dock wall	# of marinas
Channel-Port aux Basques	South West	14-15.2	7.1m-9.1m	0
Conche	Northern Pen	15.5-16m	4.9-6.1m	0
Corner Brook	Bay of Islands	11-12.2	12.5-13.7m	0
Woody Point	Bonne Bay (GMNP)	0	0	0
Norris Point	Bonne Bay (GMNP)	0	0	1
Stephenville	South West	0	7.1-9.1m	0
Port Saunders	Northern Pen	0	0	0
Rocky Harbour	Bonne Bay (GMNP)	0	0	0
L'Anse aux Meadows	Straits of Belle Isle	0	0	0
St. Anthony Bight	Northern Pen	11-12.2m	6.4-7.6m	1
Bird Cove	Northern Pen	0	0	0
Cox's Cove	Bay of Islands	0	0	0
Quirpon	Straits of Belle Isle	0	0	0
Raleigh	Straits of Belle Isle	0	0	0
Ramea	South West	0	0	0
Port au Choix	Northern Pen	0	0	0
Trout River	GMNP	0	0	0

* Note: Number of Jetties and Boats in the data was 0, and there was no information available on mooring rates.

Table 17: Amenities of the Harbours Impacting Tourism

Harbours Impacting Tourism N=17	Number with Amenity	%
Gas	4	24%
Restaurant	4	24%
Showers	2	12%
Laundry	2	12%

Table 18: Airport Traffic 2011 – 2013[60]

Deer Lake Airport	2013	2012	2011
Boarding Passenger movements Jan-Dec	156,095	152,845	146,232
Deplaning Passenger movements Jan-Dec	154,661	153,226	145,787
Total Passenger movements Jan-Dec	310,756	306,071	292,019
Boarding Passenger movements May - October	91,947	90,391	87,613
Estimate of non-residents Jan-Dec	58,208	57,231	56,131
Estimate of non-residents May-October	43,913	43,123	42,586
Percent of Vacation Travellers (based on 2011 exit survey; May-October	34%	34%	34%
Estimated number of vacation travellers (May-October)	14,812	14,545	14,364

Stephenville airport	2013	2012	2011
Boarding Passenger movements Jan-Dec	3,871	3,167	3,656
Deplaning Passenger movements Jan-Dec	2,831	3,042	3,745
Total Passenger movements Jan-Dec	5,702	6,209	7,401

St. Anthony Airport	2013	2012	2011
Boarding Passenger movements Jan-Dec	8,361	8,319	9,201
Deplaning Passenger movements Jan-Dec	8,440	8,336	9,223
Total Passenger movements Jan-Dec	16,801	16,655	18,424

[60] Government of Newfoundland and Labrador – Department of Tourism, Culture and Recreation. Tourism Performance Indicators for the Western Region, Sept 2014.

Key Findings

- There were a total of 26 calls to ports in Western NL with port calls in Corner Brook (8) , L'Anse aux Meadows (6), GMNP (5), St. Anthony(2), and Bonne Bay (1), Conche (1), Port au Choix (1), the Port au Port Peninsula (1) and the south coast(1); [61]
- These calls were part of 16 cruise itineraries that included calls to the region. These were a mixture of Canada/New England, Transatlantic and circumnavigation itineraries ranging in length from 13 to 37 days;
- In total, there were 13 ships from 11 cruise lines. Eight of the ships were expedition / adventure or small cruise ships (118 – 600 passengers with 72 – 335 crew) and three were medium to large cruise ships (1250 – 2158 passengers with 560 – 999 crew);
- Three cruise ships visited the region as part of two separate itineraries to the region: Oceania Regatta (Oceania Cruises), National Geographic Explorer (Lindblad Expeditions) and Celebrity Summit (Celebrity Cruises);
- The primary air access to the region is through Deer Lake Airport, which is a modern and appealing airport;
- Six airlines service the region at three airports – Deer Lake, Stephenville, St. Anthony;
- Porter Airlines is now flying into Stephenville from Halifax with seasonal flights;
- Airport passenger movement statistics for Deer Lake Airport show an annual increase from 2011 to 2013;
- It is estimated in 2013 34% or 14,812 of Deer Lake air arrivals were attributed to vacation travellers;
- Passenger movements to St. Anthony and Stephenville airport are small and the WDMO believes a small percentage of movements are attributed to vacation travellers;
- There are five recognized and branded car rental companies operating in the region, their primary location for operation is Deer Lake Airport. Anecdotally, it has been reported that availability of rental vehicles in high season is limited due to high demand of visitors – if this is true there would be a problem with direct impact on visitors and their ability to move around the region;
- With the growth in RV travel the region has only one operator who rents RV's to visitors; given the nature of the regions tourism products and the touring opportunity this is an attractive option for many, especially older travellers;
- Visitor signage within the region is adequate and provides sufficient directional information to help visitors navigate the region successfully;
- A new Tourist-Oriented Directional Signage (TODS) program will add more universally accepted signage throughout the province, the new program is in the final review process with implementation anticipated in 2015;

> "Considerable work and time has been part of the development of a new signage system (TODS) for the province. Final approval and implementation is pending, timing remains uncertain. The demonstration projects on the Northern Peninsula Highways were (Rte-430 and branch routes) from Deer Lake to Rocky Harbour. The Northern Peninsula area had approximately 60 new signs installed, mostly consisting of fingerboard signs that were required to tidy up a particular area where signage was very confusing and in disarray. The fingerboard signs located within Gros Morne National Park were part of that project and the province worked with Parks Canada to ensure a standard design and content."

- Ferry directional signage and the sense of arrival is weak in St. Barbe compared to welcome at Port aux Basques where there is good signage and a provincial VIC. Increasing the consistency would improve the visitor experience;
- The welcome to GMNP is underwhelming at both south and northern boundaries; there

[61] Cruise NL data sheet provided by Cruise NL. File title: 2014 Cruise NL Schedule Draft (Master) Revised Nov. 6, 2014.xls.

limited to no sense of arrival compared to Banff National Park for example. The result is that visitors may not benefit from the feeling generated when they reach their desired, and perhaps dreamed about destination;

- Guests can enter GMNP without paying an admission fee. It appears to be optional or based on an honour system. Parks Canada uses manual and electronic tracking systems at the southern park entrance.
- While there are 107 harbours reported to be in the region, only 17 have been identified (by the Western DMO) as having a direct impact on tourism (they are used by tourist boaters), services like gas, restaurant, showers and laundry are available at less than five of the 17 identified;
- 2014 provincial performance statistics indicate declines in non-resident auto visitation. While this could be cause for concern, BCTRD indicates a decline in auto traffic has been a trend for the past several years and can be primarily attributed to annual declines in US and Canadian based auto traffic. These declines are a result of volatile gasoline prices, Marine Atlantic ferry ticket prices, passport requirements, changing traveller vacation habits, time pressures and more air travel options. To support this thinking, airport activity (boarding and deplaning non-resident air visitors) for the period ending December 2014 increased 5.8% provincially over the same period in 2013.

Implications/Considerations

- Cruise guests represent a significant number of visitors to the region. According to the 2012 Economic Contribution of the International Cruise Industry in Canada study since 2007 passenger traffic in Corner Brook increased 31% behind St. John's (53% increase) but ahead of smaller NL ports at 9% growth. This represents $6.4M in direct cruise industry expenditures, however there is no breakdown for the Western region;
- With Porter Airlines now seasonally servicing the Stephenville Airport from Halifax there may be an opportunity to leverage this service by promoting it in partnership with Porter to potential guests in Toronto, Montreal and New York, Porter's major hubs;
- There is a need to quantify the anecdotal comments that car rentals are limited in Deer Lake in high season. While this has been reported as an issue in St. John's, for example, it is important to confirm this and take steps to help alleviate the problem if in fact it is a reality in Deer Lake;
- There are gaps in visitor directional signage in some locations (e.g. St. Barbe south bound, (Route 430) from St. Anthony (north bound acceptable), Grenfell Heritage Drive south from St. Anthony (Route 432) and in the south the Granite Coastal Drive), and while the new TODS program will address these issues, there may be a need for immediate attention for signage in some locations in order to mitigate visitor confusion and frustration;
- Consideration should be given to providing clearer welcome/directional signage as visitors leave the island at St. Barbe and are enroute to Labrador; particularly as visitors must enter Quebec before reaching Labrador and the Welcome to the Big Land signage;
- Parks Canada and the province should be encouraged to enhance the welcome signage at Deer Lake and into GMNP to increase the "sense of arrival" guests enjoy and expect when travelling to such an iconic and desirable location. "There is a direct correlation between the effectiveness of a signage system and the satisfaction of individuals and groups travelling throughout the region."[62] and;
- Enhancing visitor services for individuals who travel to and around the region by water in their personal ship or vessel could impact and improve the guest journey; providing services such as laundry, showers, fuel, and transportation options to get to local

[62] Government of Newfoundland & Labrador, TODS signage presentation, quote form World Tourism Organization, http://www.tcr.gov.nl.ca/tcr/publications/HighwaySignagePresentation.pdf

grocery store and restaurants would be beneficial.

Visitor Information Services

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

Table 19: Visitor Information Centres

	Provincial N=3	Regional N=6	National N=3
Number with public washrooms	100%	100%	100%
Number with free internet access or Wi-Fi	100%	33%	67%
Number with password internet access or Wi-Fi	0%	33%	0%
Number that operate year round	0%	33%	0%
Number that operate 6 months of the year	33%	0%	67%
Number that operate high season only (Jun – Sep)	67%	67%	33%
Total number of VIC staff	11	24	17
Provide print information	100%	100%	67%
Gift shop/retail	100%	17%	67%
Video viewing area	33%	17%	67%
Picnic area or place to sit and eat	67%	83%	33%
Able to purchase food	33%	0%	33%
Museum or displays/artefacts available	0%	67%	67%
Guest computer available for visitor use	100%	50%	67%
Place to plug in and charge electronics	100%	100%	67%
Staff regularly Tweet about destination	100%	0%	66%
Staff regularly update regional/VIC Facebook account	100%	33%	66%
Able to make bookings/reservations for traveller	100%	83%	0%

Table 20: Western Region Visitor Information Centre Statistics 2011 – 2013[63]

Western Region Tourism Indicators			
Provincial Visitor Information Centres			
Port-Aux-Basques	2011 Season	2012 Season	2013 Season
Operating Season	May 2 - Oct 14	May 7 - Oct 12	May 17 - Oct 4
Number of Visitors	19,405	17,435	16,323
Deer Lake (Highway)	2011 Season	2012 Season	2013 Season
Operating Season	May 2 - Oct 14	May 7 - Oct 12	May 17 - Oct 4
Number of Visitors	13,331	11,486	12,208
Deer Lake Airport	2011 Season	2012 Season	2013 Season
Operating Season	Jan 1 - Dec 31	Jan 1 - Dec 31	Jan 1 - Sep 27
Number of Visitors	34,397	33,337	28,061
Number of visitors			
January 1 - September 30	28,550	28,664	28,061
Regional Visitor Information Centres *	2,011	2,012	2,013
Corner Brook	5,858	3,925	n/a
Hawke's Bay	2,251	2,081	1,992
At. Anthony	3,343	2,617	2,189

**Totals based on reported monthly data as available*

Operating Season varies by Centre and year
Note: Statistics include Provincial and Regional VICs only.

Key Findings

- Overall the most popular services included obtaining maps/brochures (84%), using a washroom (73%), directions to attractions/sites (57%) and directions to services/facilities (49%);
- Participation in scenic touring (88%), pleasure walking in/around communities (82%), visiting craft/gift shops (77%), visiting national historic sites (77%) and visiting lighthouses (72%) are among the top activities of VIC users. Non-users parallel the same interest categories;[64]
- Since 2011, VIC visitation has declined at Port-Aux Basques and the Deer Lake Highways, Hawke's Bay and St. Anthony, while stable at the Deer Lake Airport. (Table 20). According to the WDMO, the industry is not overly concerned that VIC visitation is in decline;
- A gap may emerge in providing visitor information in the Western region at the St. Barbe ferry terminal as traffic increases from the Trans Labrador Highway onto the

63 Government of Newfoundland & Labrador. (2014, Sept 15). *Western region performance indicators.* Document provided by the Western Destination Marketing Organization prepared by the Department of Tourism, Culture and Recreation.

64 Government of Newfoundland and Labrador – Department of Tourism, Culture and Recreation. (2011). 2011 Exit survey – Profile of non-residents using a visitor information centre (VIC). Pgs. 2, 3, 9 & 10. Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit_Survey_VIC_Users.pdf.

island and the new ferries ideally make it possible for more visitors to cross into Labrador. Currently, upon arriving from Labrador, the only VIC available is in Hawke's Bay – some stakeholders consider this too far from the visitor's arrival and the opportunity to inform visitors what is available in close proximity to their ferry departure;
- According to the WDMO, printed maps remain an important trip-planning tool that the guest still looks for – WDMO increased its print run in 2014 and they are still running low; 45,000 sub-region maps were produced in 2014 (there are four sub-region versions of the map produced and cost-shared by the sub-regions). The WDMO gets positive feedback that maps are helpful and guests ask if they have similar maps for other parts of the province;
- Conversely, there are far too many small regional maps that duplicate information contained in the WDMO map thus creating a burden on operators to fund map production through advertising for maps that may not be required by visitors;
- Content specific maps do have value, a good example is the Great Northern Peninsula Heritage Network map that contains information and directions to 12 heritage sites that work together to promote their particular sites and attractions; and
- Another example of a content specific map, albeit electronic is "SledPilot', a new app produced by NL Snowmobile Association in partnership with Transcontinental Media Inc. "The new SledPilot smartphone app contains plenty of information about snowmobiling conditions and related services in Western Newfoundland." [65]

Implications/Considerations

- In 2015, all businesses in the official provincial Travel Guide will need to be Tourism Assurance Plan (TAP) approved. At present, the WDMO reports there are businesses listed in the 2014 map that are not TAP approved and may choose not to participate in the TAP program as participation is voluntary. However, non-TAP approved businesses will not be eligible for participation in provincial marketing initiatives, including the provincial Travel Guide, website and VIC's, or be eligible for membership/partnership activities with HNL or the provincial DMO's, including the WDMO. This will likely also impact the future editions of the map project;
- Creative digital or community based visitor serving solutions should be explored at St. Barbe – in conjunction with Labrador - given the potential growth with the new ferry, the long-term potential of the Trans Labrador Highway impact and the new Red Bay NHS UNESCO designation which should increase the visitor appeal to travel between the two regions;
- While maps are reported to be popular among travellers, more study needs to be done on their value as they are costly to produce and there may be an overabundance of maps be produced and supplied to travellers; and
- An active role for the WDMO is to work with non-TAP approved businesses to meet the program standards.

65 The Western Star, (March 3, 2014*). New app putting plenty of information in the hands of snowmobilers.* http://www.thewesternstar.com/section/2014-03-03/article-3631082/SledPilot/1

Accommodation Base

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

IB3. 2 The inventory includes representation by branded or flag properties. [NO]

Table 21: Provincial Occupancy 2009 – 2014

Year	Room Nights Available	Room Nights Sold	Occupancy Rate	Room Revenue	REVPAR	ADR
2014	2,648,422	1,350,227	50.98%	$180,085,301.09	$68.00	133.37
2013	2,646,525	1,365,060	51.58%	$174,370,425.12	$65.89	$127.74
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	$51.88	$107.85
2014 by Quarter						
Q1	612,800	242,454	39.56%	29,795,606.21	$48.62	$122.89
Q2	690,803	334,761	48.46%	44,534,717.92	$64.47	$133.03
Q3	729,242	492,025	67.47%	69,131,424.41	$94.80	$140.50
Q4	615,557	280,987	45.65%	36,623,552.55	$59.49	$130.34

Note: A manually compiled table based on data in the TCR spread sheet provided titled: Occupancy REVPAR and ADR Levels for Province Western Region Zone 6 – 10 including 2014.xlsx, provided by BTCRD 31 Mar 2015.

Table 22: Newfoundland and Labrador Roofed Accommodation Occupancy Levels by Region

Region	2013	2014	Point Change	Average Daily Rate
Province	51.6	51.0	-0.6	$133.39 (+4.4%)
Avalon	66.3	62.8	-3.5	$144.72 (+4.8%)
Eastern	36.7	41.4	4.7	$118.80 (+1.2%)
Central	41.0	40.2	-0.8	$120.86 (+8.7%)
Western	39.0	40.5	1.5	$119.14 (+2.0%)
Labrador	61.2	56.4	-4.8	$132.75 (+4.1%)
Accommodation Module, Tourism Destination Management System (TDMS).				

Table 23: Provincial Performance for Available Rooms by Star Rating

Total Available Rooms	**2003**	**2007**	**2013**
2.5 or less Star Rating	1,015,958	982,661	403,352
3 and 3.5 Star Rating	927,586	1,130,875	1,492,401
4.0 or More Star Rating	329,738	484,295	615,899
Total Available Rooms	2,273,282	2,597,831	2,511,652
Occupancy Rate	**2003**	**2007**	**2013**
2.5 or less Star Rating	37.73%	37.50%	35.25%
3 and 3.5 Star Rating	51.33%	51.53%	54.61%
4.0 or More Star Rating	57.87%	52.63%	60.33%
Average Daily Rate	**2003**	**2007**	**2013**
2.5 or less Star Rating	$74.02	$83.62	$97.34
3 and 3.5 Star Rating	$85.50	$97.60	$120.27
4.0 or More Star Rating	$126.94	$136.25	$156.64

Source: Data obtained from a special data request to TCR from TDMS Oct 2014.

Table 24: Western Region Accommodation Statistics

Category	**# Of Properties**	**# Of rooms /sites**	**Daily Price Range**	**% Year Round**	**% High Season (May – Sept)**	**% Open at least 6 months**
Hotel/Motel	42	1303	$45- $180	100%	--	--
B&B	86	424	$45 - $430	N=41 48%	N=29 34%	N=15 17%
Inn	7	106	$75 - $260	N=4 57%	N=1 14%	N=2 29%
Cottages, Vacation House Rental Hostels	143	640	$74 - $935*	N=92 64%	N=25 17%	N=26 18%
RV Parks and Campgrounds	32	1,667	$12 - $35	--	N=31 97%	N=1 3%

**Note 1: Cottage/ vacation rental rates are for multi-roomed accommodations, the $935 rate is a 4-bedroom cottage.*

Table 25: Occupancy for Economic Zones 6-10 (Western Region)

Year	Room Nights Available	Room Nights Sold	Occupancy Rate	Room Revenue	RevPar	ADR
2014	656,403	265,819	40.50%	$31,705,183.32	$48.30	$119.27
2013	690,084	269,166	39.00%	31,446,751.58	$45.57	$116.83
2012	677,955	264,739	39.05%	$29,406,571.89	$43.38	$111.08
2011	639,598	262,946	41.11%	28,422,044.97	$44.44	$108.09
2010	650,839	271,461	41.71%	28,230,686.09	$43.38	$104.00
2009	638,642	265,773	41.62%	26,130,931.95	$40.92	$98.32
2014 by Quarter						
2014						
Q1	144,333	45,260	31.36%	5,271,138.13	$36.52	$116.46
Q2	176,217	59,922	34.00%	6,876,414.01	$39.02	$114.76
Q3	187,688	112,197	59.78%	14,097,459.03	$75.11	$125.65
Q4	148,165	48,440	32.69%	5,460,172.15	$36.85	$112.72
Year	**656.403**	**483,198**	**41.49%**	**$57,950,194.49**	**$49.76**	**$119.93**

Note: A manually compiled table based on data provided by the BTCRD titled: Occupancy REVPAR and ADR Levels for Province Western Region Zone 6 – 10 including 2014.xlxs, provided by BTCRD 15 Sep 2014.

Table 26: Western Region Accommodation Statistics 2011 – 2014 by Property Type[66]

Roofed Accommodation Occupancy - Western Region				
Summary Information				
Jan- Dec ALL PROPERTIES	2011	2012	2013	2014
Occupancy rate	41.1	39.0	39.0	40.5
Room nights available	639,598	677,955	690,089	656,403
Room nights sold	262,946	264,739	269,166	265,819
ADR	$108.09	$111.08	$116.83	$119.27
Jan- Dec Hotels/Motels	2011	2012	2013	2014
Occupancy rate	47.2	44.5	43.8	45.2
Room nights available	404,457	441,589	458,644	442,834
Room nights sold	190,896	196,691	200,815	200,366
ADR	$102,67	$105.14	$111.43	$114.21
Jan- Dec B&Bs/Inns	2011	2012	2013	2014
Occupancy rate	31.0	28.2	28.4	28.3
Room nights available	102,304	107,823	106,088	99,765
Room nights sold	31,697	30,409	30,166	28,266
ADR	$104.29	$114.31	$120.62	$125.45
Jan- Dec ALL Cottages/Cabins	2011	2012	2013	2014
Occupancy rate	30.4	29.3	30.5	32.7
Room nights available	132,837	128,543	125,357	113,804
Room nights sold	40,353	37,639	38,185	37,187
ADR	$136.72	$139.51	$142.27	$141.88
Source: Accommodations Component of TDMS II				

[66] Government of Newfoundland & Labrador. (2015, Mar 31). *Western region performance indicators as of 31 Mar 2015.* Document prepared by the Department of Business, Tourism, Culture and Rural Development. *Note: Please note that the data is subject to revision pending receipt of further data from the province's operators. The occupancy and average daily rate data should be the sample (properties) reporting. Considered as preliminary/estimates. Room nights sold, room nights available and room revenue should be considered counts/totals for the sample (properties) reporting.*

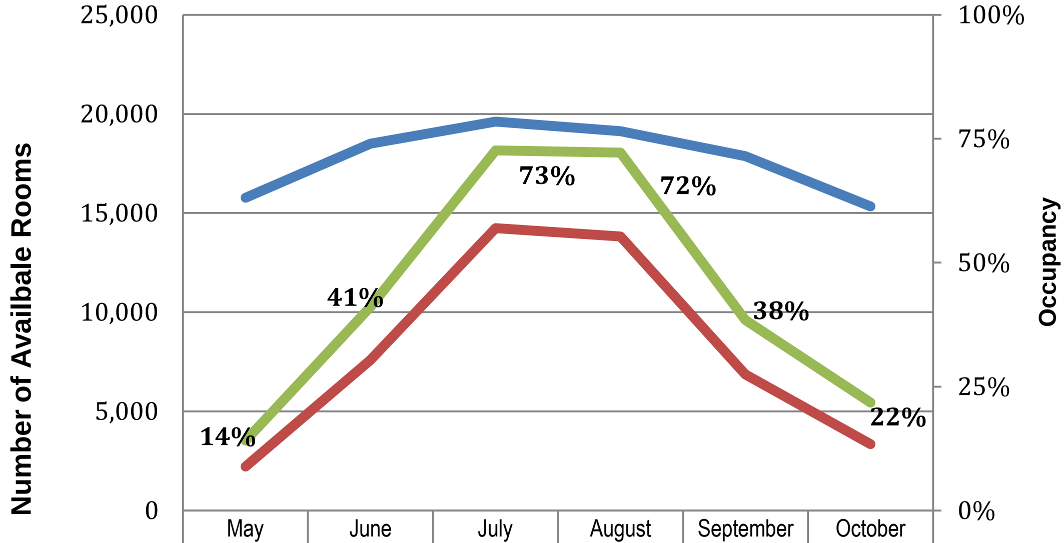
Table 27: Western Region Accommodation Statistics, 2014, *Gros Morne Zone 7* [67]

Economic Zone - 7 Occupancy Rates for 2014					
Month	Total Rooms Available/Month	Total Rooms Sold	Occupancy Rate	Total Room Revenue	Average Daily Rate
January	8,807	879	9.98%	$88,561.08	$107.79
February	9,479	1,104	11.65%	$107,681.44	$112.44
March	10,334	1,589	15.38%	$158,106.55	$108.39
April	12,274	1,384	11.28%	$135,502.98	$112.62
May	15,767	2,219	14.07%	$255,221.88	$121.59
June	18,497	7,598	41.08%	$952,344.77	$135.53
July	19,607	14,245	72.65%	$1,909,173.18	$140.31
August	19,130	13,815	72.22%	$1,818,546.23	$140.94
September	17,871	6,863	38.40%	$874,727.20	$136.95
October	15,330	3,343	21.81%	$361,088.45	$107.84
November	12,234	1,680	13.73%	$179,562.81	$124.24
December	10,133	816	8.05%	$83,203.97	$115.12
OVERALL	169,463	55,535	32.77%	$6,923,720.54	$135.99

Note: The blue highlights signify the greatest occupancy for July/August. The green highlights confirm a significant drop in the June/Sept period, and the yellow highlights illustrates another dramatic drop in Gros Morne Pocket visitation in May/October – despite the anchor Trails, Tales and Tunes Festival strengthening the month of May.

[67] Government of Newfoundland & Labrador. (2015, Mar 31). *Western region performance indicators as of 31 Mar 2015.* Document prepared by the Department of Business, Tourism, Culture and Rural Development.

May to October Occupancy[68]



	May	June	July	August	September	October
Total Rooms Available/Month	15,767	18,497	19,607	19,130	17,871	15,330
Total Rooms Sold	2,219	7,598	14,245	13,815	6,863	3,343
Occupancy Rate	14%	41%	73%	72%	38%	22%

Table 28: Western Region Camping Statistics 2011 – 2014[69]

Commercial Campgrounds				
May - Oct	2011	2012	2013	2014
Occupancy rate	32.2	37.3	38.7	42.7
Site nights available	166,530	173,712	181,406	171,047
Site nights sold	53,569	64,853	70,240	72,965
ADR	$18.47	$18.34	$18.53	$14.82
Source: Accommodations Component of TDMS II				

[68] Ibid.

[69] Government of Newfoundland & Labrador. (2015, Mar 31). Western region performance indicators as of 31 Mar 2015. Document prepared by the Department of Business, Tourism, Culture and Rural Development.

Table 29: Western Region Provincial Park Camping Statistics 2012 – 2014[70]

Provincial Parks									
Registered Camping Units and Seasonal Occupancy (Occ.)		**Units**	**Occ.**		**Units**	**Occ.**		**Units**	**Occ.**
	Season	**2012**		**Season**	**2013**		**Season**	**2014**	
Barachois Pond	May 16- Sep 17	12,302	66.1	May 15 – Sep 16	12,177	65.5	May 14 – Sep 15	12,005	64.5
Blow Me Down	June 1 – Sep10	1,060	37.5	May 31 – Sep 9	1,016	35.9	May 30 – Sep 8	1,053	37.3
J.T. Cheeseman	May 16- Sep17	2,918	30.6	May 15 – Sep 16	2,996	31.4	May 14 – Sep 15	2,793	29.3
Pistolet Bay	June 1 – Sep10	1,512	46.7	May 15 – Sep 16	1,492	46.0	May 14 – Sep 15	1,280	39.5
Sandbanks	May 25 – Sep 17	1,101	31.9	May 24 – Sep 16	1,394	40.4	May 23 – Sep 15	1,162	33.7
Sir Richard Squires Memorial	May 25 – Sep10	3,644	21.2	May 24 – Sep 9	4,054	23.6	May 23 – Sep 8	4,151	24.2
Pinware River	June 1 – Sep17	627	26.4	May 15 – Sep 16	486	20.5	May 14 – Sep 15	514	21.6
Total Western Region		23,164	40.5		23,615	41.3		22,958	40.1

Key Findings

- In 2014, the Western region's occupancy, REVPAR and ADR was well below the provincial averages (Table 21 and 25);
- In 2014, the Western region had the second lowest accommodation occupancy at 40.5% (Central lowest at 40.2%) and the second lowest ADR at $119.14 (Eastern region lowest at $118.80) compared to the other regions (Table 22);
- Table 27 details 2014 performance in Gros Morne Zone 7 and while occupancy rates are above both regional and provincial averages in July and August, performance in the other months, especially May, June, Sept., Oct. are below regional and provincial performance;
- Western region campground occupancy increased, while ADR dropped 2013 to 2014;
- There are only three branded properties in the region; branded properties offer expected levels of amenities and quality depending on the brand;
- Alternative forms of accommodation are popping up, Airbnb for example (there are 71 rental properties in NL with five in the Western region) and Couchsurfing (there are more than 10 listings in the Western region);

[70] Ibid.

- The vast majority of roofed accommodations in the Western region are independently owned, therefore, accommodation varies in terms of level of amenities and quality which can positively or negatively impact expectations of visitors;
- There are several unique accommodation properties that provide guests a unique one of a kind experience, for example Rose Blanche Lighthouse, Casey House and Raleigh Historic Village House;
- Outside the more popular or frequented visitor destinations like GMNP and St. Anthony, the accommodation options are limited in terms of quality, consistency, offered amenities and therefore are not meeting the expectations of discerning non-resident travellers;
- Corporate transient business is present in some communities (e.g.: Plum Point, Corner Brook, Hawke's Bay), which represents core business for accommodators in these communities;
- According to the WDMO, the travel trade is having difficulty securing suitable accommodations for their groups in high season at rates/quality levels they have come to expect in other destinations;
- Operators do not want to release discounted inventory to the travel trade in July/August when they can secure top rates, however, in shoulder seasons this business is welcomed;
- Corner Brook accommodators have an MOU with the municipality to pursue a DMF/DMP, this has to be approved by the province – discussions are taking place, a 3% destination marketing fund (DMF) would generate ~$325,000 for area marketing;
- The VTTA collects a 3% levy from eight hotels, two municipalities contribute $1 per head (Port au Choix, Bird Cove);
- Gros Morne Co-op collects 3% from roofed accommodators within GMNP (voluntary);
- Deer Lake, Steady Brook, Humber Valley operators are exploring a DMF; and
- Many of these sub-regional levy groups who are collecting a DMF are regularly represented on the WDMO Board, which is positive for ensuring the region's marketing investments have a holistic lens and duplication is minimized.

Implications/Considerations

- With few branded properties in the region, roofed accommodators should consider (through proactive investment practices) enhancing or upgrading their property to appeal to higher-end guests who seek the amenities and quality standards of branded, modern hotels. For example, adding amenities like; flat screen TV's, modern clock radios, up to date soft goods (bed spreads, sheets, towels, drapes, shower curtains), fresh paint/wall coverings, keyless door locks, enhanced bathroom amenities (soap, shampoo, conditioner, body lotion) and wireless internet;
- The WDMO indicates that the number of branded properties could grow from three to six within the next 18 months as new properties are built or converted to fly a national brand flag;
- REVPAR ($48.30) is low compared to provincial average ($68.00). The market may handle higher rates within the Western region, especially if accommodators take steps to enhance or upgrade their properties. Individually, or a regional price comparison of 'like properties" elsewhere, may help operators understand the rates in comparison to other regions/communities in the province;
- The Western region's lower occupancy and REVPAR performance compared to the province and other regions may be attributable to a number of factors including:
  - Many properties stay open year-round however experience very low occupancy in the off season - this negatively impacts regional occupancy and REVPAR stats;
  - Table 23 details provincial performance by available room by star rating, the Western DMO reports that a majority of properties in the region are rated 3.5 Stars or less with lower ADR (similar to provincial performance) , which drives down regional performance especially REVPAR; and

    - There is little evidence of resource based (oil, gas, mining) business compared to Labrador and Eastern where this type of business accounts for higher levels of the accommodations activity.
- While Zone 7 experiences very positive occupancy rates in July and August (a two month average of 72.43% occupancy, $140.62 ADR), its average performance in May, June, Sept. and Oct. (28.84% occupancy, $125.47 ADR) is well below the provincial and regional averages, therefore there is an opportunity to drive visitation to this part of the region in these low performing months, especially June and September;
- Finding accommodation is a challenge in high season especially in the Gros Morne area (Rocky Harbour, Norris Point, Woody Point, Trout River) and St. Anthony with no sign of new accommodation development in these areas, with the exception of the Oceanview's expansion plans in Rocky Harbour;
- The Western region enjoys visitation in the winter months as a result of the extensive snowmobile trails that are located throughout the region and numerous operators and outfitters who accommodate travel in winter. There are nine Newfoundland and Labrador Snowmobile Federation (NLSF) designated snowmobile trails and 22 identified operators who provide snowmobiling services and experiences. Additionally, the region has the largest downhill skiing resort at Marble Mountain – also connected to these snowmobile routes. The region's accommodators, who are open January to April, may benefit from increased occupancy by promoting availability of excellent snowmobiling opportunities available in the region;
- The region has many unique accommodation properties like Quirpon Island Lighthouse, Cape Anguille Lighthouse, Burnt Cape Cabins, Tuckamore Lodge and luxury chalets for rent in the Humber Valley. These accommodation resources are an attractive and appealing dimension of accommodations on offer. Promoting awareness of these properties could increase the attractiveness of the region especially among higher end non-resident travellers;
- The majority of accommodators within the region are independent operators; some may not be leveraging available online tools such as a website with a "Book Now" option or an online travel agent option (Hotels.com, Expedia), which may be impacting visitation and occupancy;
- Camping contributes significantly to the availability of overnight accommodation. It services a segment of the region's travel market and therefore, public and private campground operators must continue to meet the expectations of their customers by offering clean, comfortable and up to date services and amenities within their properties – not unlike their roofed accommodation counterparts;
- There are many B&B operators in the region, however, some are not licensed and therefore are operating in contravention of provincial legislation and are not part of Canada Select program;
- Additionally, the WDMO notes that B&B operators that are licensed are not maximizing their effectiveness by working together. For example, not all B&Bs direct or re-direct business to one another when they are at capacity; this practice should not continue especially when there are accommodation limitations in some communities in high season; and
- There may be an opportunity for the WDMO to extend their partnership with sub-regional levy groups who collect, or are planning to collect a room levy to maximize dollars spent within the region for tourism development and promotion – rather than each of the sub-regional mechanisms doing their own activities apart from the regional efforts. This is a strategy BTCRD would support.

Culture – Heritage Based Assets

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

Table 30: Number of Culture-Heritage Based Assets in the Destination

Type	# of Properties	Adult Price Range
Archaeological Sites	2	12.00
Art Galleries and Murals	7	Free to $5.00
Artists in Residence Program	3	Donation
Culture/Heritage	5	Donation – varied
Cultural Experience	4	Varied
Eco-museum	1	Free Admission
Genealogy	3	Donation to $5.00
Lighthouses	6	Donations, free admission
Monument, memorials & plaques	7	Free admission
Museums/Cultural/Historic Attractions	64	Free to $12.00
National Historic Sites	3	Free to $12.00
Outdoor Theatre	2	Free
Provincial Historic Sites	0	-

Key Findings

- There are 83 culture and heritage assets within the region, of those, 64 are identified as a museum/cultural/historical attraction. These assets are spread throughout the entire region;
- Of the 183[71] cultural heritage assets 41 have a Facebook page, these assets received a total of 18,554 “LIKES”;
- The Great Northern Peninsula Heritage Network had been working informally together for several years. In 2014 it solidified itself securing not-for-profit status. The network represents 12 historic sites that are successfully implementing a series of strategies designed to raise awareness and visitation of their partners;
- The Gros Morne Co-operating Association (GMCA) has been leading the cultural development and promotion in the Gros Morne area. In July of 2012, the first phase of their “Cultural Blueprint” was implemented (now known as Creative Gros Morne). The vision of the plan states: “The Gros Morne National Park Region will be recognized as a national centre for culture and creativity, inspired by and reflecting the natural environment that will attract international attention.”[72];
- The “Cultural Blueprint” has five strategic principles to leverage Gros Morne’s cultural assets. The plan states that “Each year between May and September, 80 artists and

71 Asset types may be counted in more than one category or type of asset.

72 GMCA’s Creative Gros Morne:, http://www.creativegrosmorne.com/about-creative-gros-morne/

their communities organize several cultural events in the area during which 400 performances, exhibitions and other activities attract nearly 30,000 participants. There are 16 museums, heritage attractions and galleries in the GMNP area, six of which draw thousands of visitors annually."[73]

- The performing arts/theatre scene is growing in the region. The WDMO indicated that the region benefits as a result of cutting edge cultural activities provided by a number of performing arts organizations including Gros Morne Summer Music, Theatre Newfoundland and Labrador, Gros Morne Theatre Festival, Stephenville Theatre Festival and Stage West Theatre Festival. In addition, companies are taking advantage of the natural landscapes to create interesting backdrops for a variety of new performances;
- The French Shore Historical Society (FSHS) has been active at preserving and interpreting the history of the Great Northern Peninsula that played a significant role in the geopolitics and European development of North America, specifically in the communities of Conche, Croque, Grandois, and Main Brook;
- Similar to the Eastern and Labrador regions, few culture and heritage attractions charge fees, and if they do, they are modest ranging from $3 to $12. Given the core demographic of the visitor and their ability to pay, this is a missed opportunity for non-resident travellers specifically and impacts their financial sustainability; and
- At Bird Cove, the 50 Centuries Interpretation Centre presents an added dimension to the heritage story by showcasing different ancient cultures (Maritime Archaic Indian, Groswater and Dorset Paleoeskimo and Recent Indian) who lived in the region, this is in addition to the Viking heritage that is more commonly associated with the region.

Implications/Considerations

- The GMCA's Cultural Blueprint has been recognized throughout Atlantic Canada as a "beacon of excellence" and represents a model other jurisdictions may wish to follow;
- The Great Northern Peninsula Heritage Network and the Creative Gros Morne initiative mentioned above are excellent destination development examples. Efforts to pass on the learning and best practices from their work to other regional, provincial and Atlantic jurisdictions would be beneficial;
- Continuing to develop and promote the arts and culture scene within GMNP is warranted as it provides an ever changing opportunity to renew the visitor invitation and attract, engage and entertain visitors, especially non-resident visitors;
- Harmon Air Force Base in Stephenville, and the work being done to build a tourism experience around this asset, should be fully leveraged as it represents a niche market opportunity to attract U.S. visitors who have direct or indirect affinity with the military;
- Given the depth of talent and collaborative efforts to grow performance based activities within the region, especially by those companies that are taking advantage of the natural landscape as the performance backdrop, efforts should be made to foster and further support this development as it is a unique, memorable and a differentiating aspect of theatre and performing arts. It can also have the benefit of end of day programming, which increases the need for overnight stays, meals, and shopping;
- Creative use of the natural landscapes as an inspiration for the performing and visual (for example the Gros Morne Summer Music and the Glynmill Pond) are good examples. Others should be encouraged to explore this interesting opportunity given the wonderful landscapes found in the region;
- The 50 Centuries Interpretation Centre in Bird Cove is an asset in this part of the region, already receiving increased level of interest; tour operator McCarthy's Party recently added it to their group itinerary; the site should receive continued development and promotional support;

[73] Artexpert.ca, Ginder Consulting. Gros Morne Co-operating Association. (Aug. 2011) Gros Morne Cultural Blueprint, pg. 1

- The FSHS has compelling reasons to visit their associated historic communities on the Great Northern Peninsula. Developing new compelling experiences along with an appealing theme would enhance the story. This interesting aspect of the history of the region should be then promoted in order to draw more visitors to the region and get them to stay longer, beyond their experience at L'Anse aux Meadows NHS and to incorporate the GNP eastern "Grenfell "Loop" into their trip planning; and
- A method of discovering the historic aspects of Conche, Croque, Grandois, and Main Brook, among other things has been and is continuing to be supported and developed through an ever expanding network of walking/hiking trails that weave through the region joining each community with emphasis connecting west (L'Anse aux Meadows) to east (Roddickton). This plays a significant role in extending length of stay and these assets should be fully exploited. Visitors need to be informed about this hiking opportunity during the trip planning phase.

Nature Based Assets

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

Table 31: Number of Nature Based Assets in the Destination

Type	# of Sites / Properties	Price Range
Beaches	8	Free to $10.00
Ecological Reserves	7	Free
Gardens/Community Parks	12	Free
Geology and Fossils	4	$6.00
Lookout / Viewing Point	22	Free to $10.00
National Parks	1	--
Natural Attractions	39	Free to $7.00
Provincial Parks	11	Free day use - vehicle fee
Wildlife Reserve	2	--

Table 32: Parks Canada Western Canada Field Unit Statistic 2011 – 2014[74]

Gros Morne National Park				
Total Visitors	2011	2012	2013	2014
June to October	180,050	182,000	192,000	184,000
Facilities				
Gateway - # of vehicles	7,531	7,736	7,882	7,304
Visitor Centre	38,195	49,476	37,725	31,038
Discovery Centre	26,239	25,827	23,782	23,601
Lobster Cove Lighthouse	17,143	17,482	18,824	19,032
Broom Point	5,578	6,174	8,476	7,551
Pool	14,696	15,319	14,462	11,108
Camping Nights	8,920	9,923	9,457	10,194
# of Bus Tours	200	195	178	165
# of People	4,867	5,484	6,096	5,422

[74] Government of Newfoundland & Labrador. 2014 Tourism Performance. (2015, Mar 31). *Western region performance indicators as of 31 Mar 2015.* Document prepared by the Department of Business, Tourism, Culture and Rural Development.

Western Brook Pond Boat Tour	24,380	22,400	22,993	23,957
National Historic Sites				
L'Anse aux Meadows	28,340	24,226	21,807	20,796
Port au Choix	8,179	9,761	6,906	7,262
Red Bay	6,834	6,669	7,700	6,892

Key Findings

- One of the Western region's largest attractors is its Nature Based Assets, with 76 accessible assets. The notoriety the region enjoys is intimately woven into the destinations' appeal and competitiveness;
- Self-discovery, such as whale watching, nature viewing and bird watching can all be enjoyed from many sites found throughout the region and provide an attractive activity for guests, however, guests who choose to see the sites may contribute to the tourism industry via fees paid to enjoy these experiences with other benefactors including accommodations, restaurants and retailers who realize increased visitation because of these assets;
- Where fees are charged to access or experience nature based assets they are minimal, the majority range from free to $10;
- In 2014, 184,000 people visited GMNP, this represents a 8,000 fewer than in 2013, GMNP secures the highest visitation than any other national or provincial park in NL;
- In 2013, Parks Canada experienced reductions to its operating budgets. This had impacts on the number of days interpretive services were available in 2014 resulting in a shorter season when interpretive services were available;
- Parks Canada will expand its interpretive programming (within a reduced operating season) at Port au Choix NHS and LAM NHS/WHS in 2015 by introducing a series of new programs (PAC - Beauty and the Barren, Seal for All Seasons, LAM – From Bog to Fog, Sagas and Shadows, Textile Art of the Viking Age);
- Fees charged for the interpretive programming at PC sites above are very low and range from $2.80 - $10.80 plus park admission fee (PAC – Adult $3.90, Senior $3.40, Youth $1.90, LAM – Adult $11.70, Senior $10.05, Youth $5.80);
- The underground salmon pool development project near Roddickton represents an opportunity to enhance the natural assets available in this part of the Northern Peninsula. It is an interesting and unique asset providing opportunity for learning, according to the WDMO website; [75]
- There are two Migratory Bird Sanctuaries in the region with National designation, sites are managed by Environment Canada and the Canadian Wildlife Service;
- Grand Codroy Estuary is the only site in the Province with RAMSAR[76] designation; and
- The International Appalachian Trail Newfoundland & Labrador (IAT) is seeking Geopark designation for Cabox, which would complement the geological assets already found in GMNP and add additional strength to the reputation of Western NL. They also have longer term plans to encourage the usage of an approach similar to that of the Areas of Outstanding Natural Beauty (AONB) program currently employed in the UK. A western region Geopark would complement the Geopark that the Eastern region is also seeking and potentially provide a new visitor journey that encourages movement between the two sites in the future.

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[75] http://gowesternnewfoundland.com/explore-by-region/northern-peninsula/route-432-roddickton/

[76] The Convention on Wetlands, called the Ramsar Convention, is an intergovernmental treaty that provides the framework for national action and international cooperation for the conservation and wise use of wetlands and their resources. http://www.ramsar.org/

Implications/Considerations

- As the region boasts an enviable list of nature based assets, most providing free/nominal access, understanding ways to utilize these assets to drive further economic impact is important. Creatively package "free" with paid assets like accommodation, culinary, interpretive programs and use of guides and outfitters to develop new market-ready, high quality visitor experience packages, is one way to achieve higher financial returns;
- Given that visitors, now more than ever, are seeking to connect and engage with local people and learn about the natural and cultural treasures of an area, budget cutbacks at federal and provincial attractions limit the opportunities for guests to engage in these memorable encounters, especially in shoulder seasons. This could have direct impact on visitor expenditure levels as guests may not stay in a particular area because of lack of interesting programming. Consideration should be given to soliciting interest from private sector third parties to deliver interpretive programming outside high season ensuring the successful operation of such services through the creation of realistic business models;
- A significant amount of background research was done by IATNL around the real and potential opportunities connected to developing a Cabox Geopark. A case has been made that pursuing this opportunity would enhance the appeal of the region especially among non-resident travellers and in particular international and U.S. travellers. As the Western TDVAA recommendations are developed its suggested (by the consultants) that fully understanding and potentially leveraging the opportunities described in the various IATNL reports should be explored; and
- In Roddickton, the Underground Salmon Pool development project represents an excellent opportunity to leverage this natural asset. Site development includes an access road, interpretive signage, a walking trail, boardwalk and viewing area near the pool. Completion of these enhancements would add to the visitor appeal of the asset.

Trails and Routes

IB6: The destination has driving routes that direct visitors through the Destination (e.g. Arts Trails). [NO]

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 33: Trails & Routes in the Destination

Type	**# Routes**
Themed driving routes with interpretation	0
Themed driving routes with signage	2
Walking/hiking with interpretation (personal interpretation)	47
Walking/hiking with signage (non-personal interpretation)	108
City/town based heritage interpretive trails	13
ATV Trails	9
Back Country Hikes	24
Backcountry Ski Access	31
Berry Picking	55
Coastal Trails	52
Hiking and Walking Trails	143
Mountain Biking	42
Town and Country Treks	35
Trails in National and Provincial Parks	41
Ski Trail	10
Snowmobile Trails	9
Scenic Touring Routes	11
Self - Driving Vacation	0
Swimming	17

Table 34: 2011 Non-Resident Travel Parties Trail Hiking, Areas of Province Visited (and stayed at least one overnight) (% Parties - May to October) [77]

	Overall	**Those Participating in Trail Hiking**
Zone 6: Viking Trail, St. Anthony, South West to Plum Point, East to Roddickton/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%

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.

Key Findings

- The Western region encompasses one Category 1 trail in GMNP (over 100km of well-maintained trails, combination of challenging treks, full day hikes to short walks with nicely groomed trails and interpretation signage) and four Category 2 trails at L'Anse aux Meadows, St. Anthony, Corner Brook (City), Blow Me Down Mountains & Humber Valley area (over 50km of well-maintained trails, combination of full and half day hikes to short walks with nicely groomed trails and interpretation signage[78];
- The variety of hiking trails found in the region is significant, from wet land, back county, coastal, mountain and riverside trails to trails on geological sites (Tablelands and Humber Valley) and to natural wonders (Western Brook Pond, Codroy Valley, Thrombolites and the underground salmon pool);
- The variety of trails cater to a range of hikers from beginners to avid / accomplished hikers;
- Nine snowmobile and ATV trails provide riders with a variety of trail experiences from rail bed trails to back country trails;
- 11 scenic touring routes include: Admiral Palliser's Trail (45 km), Captain Cook's Trail (47 km), Caribou Trail (148 km), Codroy Valley International Wetlands (60 km), French Ancestors Route (125 km), Granite Coast Scenic Drive (45 km), Grenfell Loop (178 km),Humber Valley (70 km), Main River Run(73 km), Three Rivers Scenic Drive (104 km), Viking Trail (489 km)[79];
- Of the 150 trails and routes reported in TDMS 93% have a website, 15% have a TripAdvisor account and 19% have a Facebook page;
- Many hiking and walking trails are groomed in winter to provide access for cross-country skiing and snow shoeing throughout the region;
- Work continues in the Northern Peninsula to connect the west with the east by expanding and enhancing trail network to connect the two parts of the area, specifically L'Anse aux Meadows NHS and Roddickton. For example, 13 trails have been assessed in the Roddickton area, each having potential for significant development;

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

[78] Rendell, S. (2012, March). *Walking & hiking product – thoughts on how to present the product.* Document provided by the Western Destination Marketing Organization.

[79] Government of Newfoundland and Labrador tourism website, http://www.newfoundlandlabrador.com/PlacesToGo/ScenicTouringRoutes

- Trails located in other parts of the region such as in Cow Head and St. Paul's, and in areas in the south west coast, such as Flat Bay and Robinson's hold potential for development and these communities have been encourage to apply for license to occupy and then to collaborate with local business to enhance the trail assets in order to drive increased levels of visitation and economic impact;
- The National Trails Coalition continues to invest in trail development within NL, with project funding for snowmobiling ($175,000), ATV ($175,000), hiking ($150,000)[80];
- Trail development and expansion is required in GMNP as some trails are at capacity impacting the attractiveness of these trails;
- While snowmobiling is permitted in GMNP, it is not something that is widely promoted as Parks Canada develops a strategy to monitor impacts and manage the opportunity;
- Four communities in GMNP (Rocky Harbour, Norris Point, Woody Point and Trout River) have made significant strides at trail development. Each community has applied for "License to Occupy" so development can continue to occur on federal crown land paving the way for added capacity and diversity of hiking experiences;
- A geologically-based trail network is in development in the Port au Port area; the area contains over 30 significant geological sites all accessed by the trail once it is fully developed;
- BTCRD is spearheading a "cluster based" approach for trail development throughout the province; this approach capitalizes on the presence of trail networks and connect trail groups to local community tourism-based businesses to ensure that trail development is done as a collective effort in order to enhance the visitor experience, extend visitation in an area and drive economic impact;
- Where natural trail networks exists in communities such as Rocky Harbour, Norris Point, Codroy Valley, Deer Lake, Steady Brook and Corner Brook, efforts are being made to expand trails using the cluster-based approach in partnership with, and through, the support of local businesses;
- A cluster based approach to trail development would also be beneficial in Port Saunders, Hawke's Bay, Port au Choix and River of Ponds;
- The NL Snowmobile Federation's headquarters are in Deer Lake supporting the strength of the snowmobile trail assets found in the region;
- ATV and snowmobile enthusiasts are a close-knit community. They share experiences through club newsletters, blogs and online forums; leveraging the power of this community represents an opportunity for the region. Steps should be explored to enhance communication about the region's vast and varied trail network through online mediums;
- The Atlantic Canada Trail Association has produced an Assessment Trail User Guide, the contents of which detail 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 Western region;
- In conversation with Ed English of Linkum Tours, he made the following observations: "In addition to longer trails, I am also getting requests for an option for the guest's luggage to be dropped off at different accommodations each night. Potential tourists have been mentioning this with regard to the East Coast Trail and wanting to do it on the West Coast as well. With that in mind, my first thoughts are to design a route that: takes in the highlights of the tip and GMNP, minimizes backtracking, returns to the out ports for food and accommodation options, and flexible enough to offer short (as exists now) or long one-day hikes but also be extendable to several overnights"; and

[80] Information provided by BTCRD, Andy Hennebury, Industry Development Officer, Sept. 26, 2014

- St. Anthony Basin Resource Inc. (SABRI) continues to have direct involvement in community development in 17 communities in the Northern Peninsula, many of which have a trail focus and has been welcomed by many tourism leaders. SABRI does not however invest in ongoing trail maintenance. They rely on the local trail group or municipality to take on this task, sometimes effectively and sometimes not, which could create sustainability challenges in the future.

Implications/Considerations

- The ATV and snowmobile trail network in the region is extensive and opportunities to leverage these assets have not been fully realized. For example, the back country trails provide a number of “bucket list” worthy experiences for both ATV and snowmobile riders;
- Priority to leverage both ATV and snowmobile trails should be first directed at residents as these travellers can more easily access the trail networks. Secondary focus could target non-residents as these enthusiasts will make the effort to travel their machine to the island in spite of transportation challenges and restrictions on Marine Atlantic;
- There are private businesses that cater to “fly ride” ATVers and snowmobilers. These businesses should be promoted as they provide a valuable service that includes machine rentals, accommodation, guiding services, logistical arrangements etc. All this enhances the attractiveness of the region for potential resident and non-resident trail users;
- Stephenville, the Lewis Hills and the surrounding areas, provide some of the most exciting and intense backcountry snowmobiling opportunities in the province, perhaps in the country. Leveraging these assets to attract both a resident and non-resident audience presents a significant opportunity to grow visitation to the region in the winter, with focus on spring snowmobiling;
- The extensive coastal and rail bed ATV trails in the south present a visitation growth opportunity. Currently, the trails are underutilized;
- As a result of more profile and exposure for trails beyond GMNP being featured/promoted through websites and social media, increased visitation should be realized in other sections of the Long Range Mountains including the Humber Valley, Bay of Islands, Southwestern areas and along the Great Northern Peninsula;
- Leverage GMNP’s reputation as a great hiking destination and introduce non-residents hikers to other trails located in the region; these trails offer diverse hiking experiences that include wetland, coastal, mountain, riverside terrain, along with heritage and nature trails, all outside of GMNP;
- By aggregating the trail development findings between the Western, Labrador and future Central TDVAA’s, a stronger visitor experience will be created that invites and entices people to move around the province based on specific attributes;
- The snowmobile “hub” project-in-the-pipeline in Deer Lake represents an interesting opportunity for the entire region if it were to become the snowmobile gateway to Western Newfoundland;
- Potentially, other “hubs” or important snowmobiling “clusters” exist where snowmobile-friendly activities can be capitalized upon or further developed along these lines (Steady Brook/Marble Mountain, Stephenville/Lewis Hills, Corner Brook, Bay of Islands, the Great Northern Peninsula north of Gros Morne region);
- Mountain biking trail development has begun in Corner Brook after representatives from the International Mountain Biking Association visited the area to assess the trail development opportunities. They determined there were significant opportunities present and a 57 km looped trail was proposed between the City of Corner Brook and Marble Mountain; and
- Mountain biking trail development is also being explored in GMNP between Rocky Harbour and Norris Point.

Recreational and Man-Made Attractions

IB7. The destination has man-made attractions at a variety of price points. [Almost]

Table 35: Recreational & Manmade Attractions in the Destination

Assets	Number	Price Range
Total Number of man-made attractions	18	Free to $59.00
Animal farm	3	$7.00 - $10.00
Aquarium	1	$6.25
Driving range	2	Prices not provided
Family amusement park	2	$7.00 - $12.00
Golf courses	7	$7.00 -$90.00
Mini-golf	3	$7.00- $12.00
Science Centre	3	$6.00 - $12.00
Ski Resort/Parks	3	$32 - $59 day lift tickets
Spa	0	--

Note: Recreational and man-made attractions tracked in the study but not present in TDMS for Western include: marinas, paintball, rock-climbing, downhill skiing, and snowboarding. All others, see Activity Based businesses.

Table 36: Marble Mountain Statistic 2010/11 – 2013/14[81]

Marble Mountain	2010/11	2011/12	2012/13	2013/14
Ski Days	82	100	83	85
Skier Visits	72,551	71,470	66,069	67,078

Key Findings

- While there are only 18 man-made attractions in the region, many offer experiences that are synonymous with the region's natural landscapes, the largest being Marble Mountain Ski Resort. Other examples include the Bonne Bay Marine Station, Torrent River Salmon Interpretation Centre, and the Newfoundland Insectarium. These are all unique man-made attractions that showcase the regions natural wonders; and
- Commercial land based development is at the planning stage at Marble Mountain to include attracting investment in man-made attractions like mini-golf, zip line, sliding park; a report is due in the fall of 2014.

Implications/Considerations

- The WDMO and tourism stakeholders in Deer Lake and Corner Brook are anticipating the implementation of the recommendations contained in the Marble Mountain Resort Comprehensive Base Area Master Plan and Development Strategy. This is viewed as a growth opportunity for tourism within these communities.

[81] Government of Newfoundland & Labrador. 2014 Tourism Performance. (2015, Mar 31). *Western region performance indicators as of 31 Mar 2015.* Document prepared by the Department of Business, Tourism, Culture and Rural Development.

Shopping & Retail

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

Table 37: Shopping Businesses in the Destination

Shopping	# Of Properties N=64*	% Year Round*	% 6 month + operation*	% high season only*
Art or Craft *Studios*	19	39%	9%	31%
Antique Dealer	0			
Antique Shops	4			
Craft Shops	46			
Commercial Art Galleries	10			
Souvenir/Gift Shop	28			

**Note: Some retail businesses fit more than one category*

Key Findings

- There is a variety of arts and craft studios, shops and galleries spread across the region featuring the creative talent of Western NL's artisans;
- The 28 souvenir and gift shops enable visitors to purchase goods and mementoes synonymous with the region. For example, Dark Tickle visitors can purchase berry jams, jellies, preserves and chocolate that are locally harvested and produced;
- The GMCA's Cultural Blueprint Strategy support projects that strengthen the culture potential within the region. The works of local crafts people are retailed to visitors at artist's studios, shops or galleries as well as at arts shows at various venues within Gros Morne;
- The League of Artists of Western Newfoundland is a non-profit artist run organization that supports and promotes artists living in Western Newfoundland by seeking out venues and mounting exhibitions for member artists to display and sell their work;
- Rug Hooking at the Grenfell Mission and the sale of these products generated money for the mission to operate. There is a history of rug hooking in the region. Molly White is an excellent example of an entrepreneur, who in less than a decade, started a business based on her passion for rug hooking and has built it into an award winning company with domestic and international reach;
- Rug hooking pockets, particularly in Bonne Bay South, GNP East continue to exist / thrive; and
- The Craft Council of Newfoundland and Labrador (CCNL) has standards for businesses to attain. They provide opportunities for artists to sell their goods at the CCNL shop in St. John's, at various art shows and gain exposure in the CCNL Guide publication. However, the standards are different than the provincial TAP program, so, unless a company also meets the provincial TAP standards, they cannot be marketed on www.newfoundlandandlabrador.com. Anecdotally, one of the main reasons cited for limiting uptake is related to insurance.

Implications/Considerations

- Shopping for local artist products has value to visitors. Providing artists and craftspeople with mechanisms to develop their business fosters growth of the creative community within the region; activities that deliver these benefits should continue; and
- While the CCNL provides an important service, artists who have a desire to receive

CCNL certification must travel to St. John's and participate in a juried exhibition process – this presents a problem for some, as they are not able to make that trip due primarily to cost. It is suggested the Council explore ways to take the jury "on the road" to allow more artists to become accredited, especially when considering Western NL.

Culinary, Food and Beverage

IB9.1 The destination has restaurants with a variety of options and price points. [YES]

IB9.2 The destination offers food and beverage options that respond to the needs of various travellers. [ALMOST]

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

Table 38: 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 *	190	71%	18%	8%	12	6	-
Casual Dining	129						
Catering	7						
Fine Dining	8						
Fast-Food	55						
Coffee Shops	32						
Bakeries	3						
Pubs/Bars	11						

* As reported by E-Dining (Restaurant Association of NL) some establishments count in several categories

Table 39: Specialized Food and Beverage Options in the Destination

Food and Beverage*	Number	Percentage
Vegetarian/Vegan	85	45%
Gluten Free	15	8%
Heart Healthy (e.g. low sodium, low fat, whole grain)	22	12%
Local foods (from the region)	63	33%
Local Newfoundland & Labrador recipes	66	35%
Local beverages (wine, beer, ciders)	57	30%
Ethnic food (Chinese, Greek, Italian, etc.)	14	7%
Child menus	56	29%
Senior menus	1	1%

Table 40: Culinary Themed Establishments in the Destination

Culinary	# of Properties	% Year Round	% 6 month + operation	% high season only	# with Hands-on Experiences
Wineries	0	-	-	-	-
Breweries	0	-	-	-	-
U-Pick	4	-	25%	75%	1
Farm Gate	16	19%	50%	31%	2
Root Cellar	0	-	-	-	-
Farmers Markets	7	29%	14%	57%	2
Farms/Organic Farms	17	17%	24%	59%	2
Other	20	15%	5%	80%	9

Key Findings

- At one time, NL was 90% self-sufficient. Today it is closer to 90% reliant on food from off-island sources, however, there is a local food movement emerging to return a better balance of local/from away food products to the tables of those who live and visit NL;
- Roadside gardening is a Western region (even more so on the Great Northern Peninsula) phenomenon. Local residents take advantage of land and good soil along major highways to plant vegetables for their own consumption;
- Dark Tickle in St. Anthony is a well-known establishment and econo-musee offering cooking classes and local berry and chocolate products for sale;
- Moose meat processors who operate in the region and take their products to market are making their way to restaurant tables throughout the region, these producers require a special commercial license to do business in this way;
- Bakeapples and Partridge Berries are two products found in the Western region and they make up the basic ingredients for a long list of regional food offerings;

- The lack of culinary options has been identified as a concern by tour operators when looking at what their guests would need/expect if they were to bring their business to the region. This needs to be addressed, even on a targeted basis by community;
- The culinary scene in GMNP, the Humber area and L'Anse aux Meadows continues to grow, demonstrating that it is possible to offer high quality, diversified food and beverage dining experiences in smaller communities. Neddies Harbour Inn, Java Jacks, Justin Thyme, Oceanview, Earles, Sugar Hill Inn, the Daily Catch, the Norseman, Madisons, Gitano's, and Newfound Sushi – use local foods and recipes and the proprietors have availed themselves to learning opportunities offered through GMIST and the BICT to improve and diversify their food offerings and quality of their chef and staff;
- In other communities, there are charming cafés offering quaint and comfortable ambiance and informal dining options. Some feature a variety of local food products;
- The BC-based program called "This Fish" (www.thisfish.info) is being piloted in select NL communities that could enhance the visitor experience. This Fish, connects diners to the source of their seafood by tracing its journey back to its origins and connecting discerning guests with the fishermen, location of the catch and stories about the people who catch their seafood and stand proudly behind their catch82
- "From This Rock" culinary tour, developed by Agri-Foods NL and local chef Roary MacPherson, takes chefs on a tour of NL to enlighten them about the local food products available encouraging them to use these products in their commercial kitchens; and
- There is a mixture of culinary (baker/cook) and tourism related programming at Academy Canada's Corner Brook campus. The College of the North Atlantic, Western region campuses at Port aux Basques, Corner Brook, St. Anthony recently cut its tourism related programs (budget 2013) but still offers some cooking/baking classes at the Bay St. George (Stephenville) campus.

Implications/Considerations

- Similar to most destinations in Canada, there are labour issues in the region in terms of having enough well trained cooks and wait staff to work in establishments and serve at the quality expected by visitors. Creative solutions need to be explored if the food and beverage experience is to be improved; if not, only pockets of excellence will exist;
- There is little done to market the unique culinary offering within the region or province, outside of St. John's. Featuring the culinary treasures of the region in paid and unpaid media exposure would be beneficial to those thinking about visiting the region and seeking a special culinary experience while travelling – providing they are targeted to those who can deliver the quality and value expected by travellers;
- In the off-season food options are more limited in terms of offering fresh or local products;
- The Bonavista Institute for Cultural Tourism (BICT) offers culinary training programs, therefore, efforts must be made to encourage more participants to enroll in NL based courses; and
- Best practice missions offered through GMIST (with potential for registration subsidies by ACOA and BCTRD) should continue to include culinary content and constantly be fine-tuned in order to find and encourage the right people to go on these valuable learning opportunities.

[82] Ecotrust Canada, 2013. Fish, Food & Allied Workers are partners with ThisFish in coordinating and training fish harvesters in Newfoundland and Labrador. http://thisfish.info/about/what/.

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. [ALMOST]

Table 41: 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>29</td><td colspan="3" rowspan="9">This level of detail not provided</td></tr>
<tr><td>Person Capacity (Total theatre seating)</td><td>4,543 (24 venues)</td></tr>
<tr><td>Person Capacity (Ballroom rounds/seating)</td><td>2,710 (21 venues)</td></tr>
<tr><td>Trade show or exhibit space (square footage)</td><td>52,450 (27 venues)</td></tr>
<tr><td>Plenary Space and Break Out Rooms</td><td>16 Sites</td></tr>
<tr><td>Onsite Catering</td><td>29 Sites</td></tr>
<tr><td>Onsite AV Equipment/ Support</td><td>27 Sites</td></tr>
<tr><td>Sufficient overnight accommodation</td><td>20 Sites</td></tr>
<tr><td>Open Year-Round</td><td>100%</td></tr>
</table>

Key Findings

- Meeting space throughout the region located in hotels and community centres primarily host local and regional events;
- The Civic Centre in Corner Brook was built in part to host a number of 1999 Canada Winter Games events and ceremonies. It includes a 3500 seat hockey arena/rink, and a second rink next door that seats 500 and there is also the Annex, a multi-purpose space for meetings, banquets trade shows; this venue hosts regional, provincial and small national meetings;
- A study is underway for Corner Brook examining markets the City and their hotels solicit related to the Civic Centre; this could not only include sports events but also provincial and regional conferences and trade shows;
- The region has played host to a variety of regional, national, international sports events including the World Broom Ball Championships, the 1999 Canada Winter Games, 2014 Cross Country Ski Nationals to name a few;
- Marble Mountain resort hosts regional and provincial ski, snow board events which deliver participant and spectator room nights to the Steady Brook, Humber Valley, Deer Lake and Corner Brook stakeholders;
- The GMCA has a long-standing track record of attracting conferences to Rocky Harbour of national/international appeal such as the Sustainable Tourism Conference (2008), the Canadian Network for Environmental Education and Communication (2008) to the provincial music awards (2010) to more recently securing the Outdoors Writers Association convention. They provide off season opportunities for the communities hotels, restaurants and the program people in town; and
- Pre and post trips by St. John’s convention delegates do make their way to the Western region; the WDMO proactively works with Destination St. John’s to leverage this opportunity.

Implications/Considerations

- The region has limited opportunity to secure major business from the meetings and convention market. Those with the infrastructure to attract this type of business, however, should be encouraged to collaborate to create a targeted identity for what they have to offer, define niche markets to promote to, while ensuring excellence in service to maintain the meeting business they are currently attracting;

- The meetings and conventions business is changing and a number of trends are emerging. For example, fewer larger meetings are being held as delegate participation is in decline and organizations are opting for smaller, shorter, regional meetings to minimize cost and time away. Any investment to grow the current businesses should be done with caution;
- Ownership changes with the Pepsi Centre in Corner Brook (now the Civic Centre) could have beneficial impact on the tourism sector if sales efforts continue to produce results. Sports Tourism may present a greater opportunity in Corner Brook by utilizing the Civic Centre since the city now manages the venue as of Sept. 2014; and
- The addition of a levy in Corner Brook could provide new financial resources to strategically pursue the sports tourism and regional and provincial M&C markets, (against the context of the changing meetings market landscape); this is the requirement of those hotels involved in the implementation of a levy.

Activity-Based Tourism Businesses (AB)

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

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

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 42: Activity-Based Tourism Businesses in the Destination

Activity Based Companies	# Of Visitor Opportunities	Seasonality *		
		% Year Round	% 6 month + operation	% High season only
Total Number of Companies	**N = 39**	**36%**	**23%**	**41%**
Angling	6	50%	33%	17%
ATV Tours and/or rentals	5	60%	40%	--
Biking	5	50%	17%	33%
Bird Watching	4	80%	20%	--
Bird Watching Boat Tours	6	--	33%	67%
Canoeing	3	--	100%	--
Caving	5	80%	10%	10%
Climbing	2	--	--	100%

Activity Based Companies	# Of Visitor Opportunities	Seasonality *		
		% Year Round	% 6 month + operation	% High season only
Cross-country Skiing	6	--	--	100%
Cross Country Skiing Tours	4	--	--	100%
Dog Sledding	1	--	--	100%
General Sightseeing	8	33%	33%	33%
Group Sightseeing	6	33%	17%	50%
Hiking and Walking	14	50%	17%	33%
Ice Climbing	1	100%	--	--
Iceberg Watching	3	20%	20%	60%
Iceberg Watching – Boat Tour	5	33%	33%	33%
Nature and Wilderness	13	50%	19%	31%
Photography	3	--	33%	67%
Rafting	2	--	--	100%
Recreational Fishing Boat Tour	5	20%	20%	60%
Rock Climbing	1	100%	--	--
Sea Kayaking	8	50%	12%	38%
Snowmobile	11	--	--	100%
Snowshoeing	8	--	--	100%
Step On Guide	1	--	100%	--
Tour Package	10	50%	25%	25%
Tour Planning	1	100%	--	--
Whale Watching	3	33%	33%	33%
Whale Watching Boat Tour	10	18%	27%	55%
Winter	18	--	--	100%
Winter Caving	2	--	--	100%
Zip Lining	1	100%	--	--

Note 1: Data not available for all assets

Note 2: Additional types of activity based companies tracked in the TDVAA but not present in TDMS for Western includes: diving/snorkeling, kite skiing, photography, RV tours.

Table 43: Characteristics of the Activity Based Companies

Activity Based Companies Characteristics	# Of Assets	% Of Assets	Price Range
Program Length			
1 hour programs (or less)	2	5%	\$5 - \$45
2 – 3 hour programs	12	31%	\$15 - \$174
Half Day programs	4	10%	\$24 - \$450
Full Day activities	12	31%	\$5 - \$1,050 (low price due to self-discovery)
2 – 3 day excursions	6	15%	\$250 - \$650
4 – 7 day excursions	9	23%	\$775-\$9,000
8 – 10 day excursions	1	3%	\$2,700-\$11,000
11 – 14 day excursions	0	--	--
Program Dynamics			
Single site-based activity	30	77%	
Multi-destination based activity	8	21%	
Guided	32	82%	
Self-discovery	17	44%	
Experience Dynamics (Answered to the best of the data collectors' ability)			
Educational	16	41%	
Physical	28	72%	
Social	5	13%	
Spiritual	0	--	
Connects you to the place	13	33%	
Connects you to the people	8	21%	
Connects you to the culture	12	31%	
Engages the senses	0	--	
Interactive/hands-on engagement	33	85%	
Unique to Newfoundland & Labrador	19	49%	
Behind-the-scenes experience	0	--	
Skill * some businesses offer experiences that fit more than one category			
No skill required (e.g. never kayaked)	38	97%	
Some skill required (e.g. paddled a few times, know a bit about kayaking)	10	26%	
Highly skilled requirements (e.g. certified/experienced kayaker).	2	5%	

Availability			
Sell direct to travellers	34	87%	
Packaged Independent Travel options	11	28%	
Group Travel Options	9	23%	

Table 44: Characteristics of all the 39 Angling Outfitter 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 (39) **Number of Locations (assets = 41)**	**N = 39**	5%	15%	80%

Angling Outfitters	# Of Assets	% Of Assets	Price Range
Program Length – some offer more than 1 length			
1 hour programs (or less)	--	--	--
2 – 3 hour programs	--	--	--
Half Day programs	--	--	--
Full Day activities	--	--	--
2 – 3 day excursions	--	--	--
4 – 7 day excursions	37	95%	$1,800 - $9,000
8 – 10 day excursions	3	5%	$7,900 - $11,000
11 – 14 day excursions	--	--	-
Program Dynamics			
Single site-based activity	0	--	
Multi-destination based activity	0	--	
Guided	39	100%	
Self-discovery	0	--	
Experience Dynamics (Answered to the best of their ability)			
Educational	0	--	
Physical	39	100%	
Social	39	100%	
Spiritual	0	--	

Angling Outfitters	# Of Assets	% Of Assets	Price Range
Connects you to the place	39	100%	
Connects you to the people	39	100%	
Connects you to the culture	39	100%	
Engages the senses	39	100%	
Interactive/hands-on engagement	39	100%	
Unique to Newfoundland & Labrador	--	--	
Behind-the-scenes experience	--	--	
Skill			
No skill required	2	5%	
Some skill required	39	100%	
Highly skilled requirements	1	2%	
Availability			
Sell direct to travellers	39	100%	
Packaged Independent Travel options	0	--	
Group Travel Options	0	--	

Table 45: Characteristics of all the Hunting Outfitter Assets of the 56 Companies

Hunting/Outfitters	# Of Visitor Opportunities	Seasonality (INFORMATION NOT PROVIDED FOR ALL ASSETS)		
		% Year Round	% 6 month + operation	% High season only
Total Number of Companies (56) **Number of Locations (assets = 58)**	**N = 56**	4%	14%	82%

Hunting Outfitters	# Of Assets	% Of Assets	Price Range
Program Length – this level of detail not available for all outfitters			
1 hour programs (or less)	0	--	--
2 – 3 hour programs	0	--	--
Half Day programs	0	--	--
Full Day activities	0	--	--
2 – 3 day excursions	0	--	--

Hunting Outfitters	**# Of Assets**	**% Of Assets**	**Price Range**
4 – 7 day excursions	36	64%	$1,800 - $9,000
8 – 10 day excursions	3	5%	$7,900 - $11,000
11 – 14 day excursions	0	--	--
Program Dynamics			
Single site-based activity	--	--	
Multi-destination based activity	--	--	
Guided	56	100%	
Self-discovery	--	--	
Experience Dynamics (Answered to the best of their ability)			
Educational	0	--	
Physical	56	100%	
Social	56	100%	
Spiritual	0	--	
Connects you to the place	56	100%	
Connects you to the people	56	100%	
Connects you to the culture	56	100%	
Engages the senses	56	100%	
Interactive/hands-on engagement	56	100%	
Unique to Newfoundland & Labrador	--	--	
Behind-the-scenes experience	--	--	
Skill			
No skill required	1	2%	
Some skill required	56	100%	
Highly skilled requirements	1	2%	
Availability			
Sell direct to travellers	56	100%	
Packaged Independent Travel options	0	--	
Group Travel Options	0	--	

Note: There are 66 outfitter companies servicing angling and hunting enthusiasts, so additional data was gathered to provide a better level of understanding about these assets.

Table 46: Types of Companies Outfitters

Outfitters (some provide angling and hunting)	# of Companies (66 total)	Percentage
Market ready product for consumer sales	66	100%
Private camp/property by invitation	0	-
Significant Infrastructure	32	48%
Temporary Camps (minimum infrastructure)	51	77%

Key Findings

- The Western region is an outdoor recreation destination rich with activity based assets from hiking, biking, angling, hunting, ATV, snowmobiling and many other pursuits;
- The majority of activity based pursuits take place on the region's rich outdoor landscapes;
- There are 39 companies providing a wide variety of activity based experiences, 41% operate in high season or in the fair-weather months of the year, 36% offer their services year-round;
- Visitors can access the majority of these activity based assets with little or no skill level, for time periods from one hour to multiple days;
- The activity attributes are varied connecting guests to the local people who provide learning and hands on engagement;
- Many of the activity based assets deliver no or low revenue to the region as they are self-directed and access public lands at little or no cost. For example, bird watching, kayaking, hiking, biking, cross country skiing are all activities visitors can participate in for free or at for a modest fee (unless an outfitter or guide is used);
- There are niche opportunities present (ice climbing, rock climbing, bouldering), attracting enthusiasts interested in these very specific activities;
- Many operators offer numerous activity based experiences however limitations in TDMS restrict companies from listing more than three services. This impacts their ability to fully communicate what they offer to potential guests. For example, Linkum Tours offers nine different experiences but can only feature three in BTCRD's visitor publications, VIC's and website;
- There are 66 angling and hunting opportunities; companies that provide a variety of services from lodging, guiding, and equipment rentals to resident and non-resident anglers and hunters; some companies operate with more than one site; the data indicates a total of 158 sites where angling or hunting occurs in the Western region;
- BTCRD is undertaking a Business Retention and Expansion (BR&E) Diagnostic exercise with 17 hunting and fishing outfitting businesses throughout the province. The program is based on an internationally recognized economic development tool that helps identify and address barriers to survival and growth faced by existing local businesses. It is a tool for operators to look holistically at their business and uncover those issues that may limit their future plans and overall growth/success. Through an interview and follow-up report process, BR&E aims to make local businesses more competitive by evaluating and addressing their broader needs and concerns. Specifically, the process will focus on areas of marketing and sales, operations, finance and accounting, human resources and management and future plans;
- A non-resident wishing to angle in scheduled waters or angle for trout beyond 800 meters of a provincial highway must be accompanied by a licensed guide or by a direct relative who is a resident of Newfoundland and Labrador (scheduled waters are under federal regulations and in this province manage salmon populations);
- Licensed guides are registered by the Government of Newfoundland and Labrador

following successful completion of a Firearm Safety/Hunter Education course, a boating safety course, and a valid first aid course; or, successful completion of a guide training program; (administered by the Department of Environment and Conservation, Wildlife Division);

- The process and related qualifications to becoming a guide, takes hunting into consideration above angling, emphasis in terms of qualifications is on hunting and not angling;
- There is currently no provincially sponsored guide training program; in the past the College of the North Atlantic (CNA) had a two-year Adventure Tourism-Outdoor Recreation program and a Hunter/Fisher Guide program (a nine week program for individuals currently involved in the outfitting sector and 20 weeks for new entrants to the industry) both of which had significant curriculum on best practices for guiding services. Both of these programs were recently eliminated (Adventure Tourism-Outdoor Recreation cohort finished in the Spring 2014 and the Hunter/Fisher program ended in 2012) but efforts are underway to reintroduce programming at CNA combining elements of the previous training programs;
- The Government of Newfoundland and Labrador has, in the past, sent correspondence to licensed guides requesting them to self-identify to BTCRD if they are interested in working as a hunting and/or fishing guide for a big game outfitter and/or as a guide for daily hire. The correspondence asks them to identify which opportunity(s) they are offering their service, which area of the province they prefer to work, and to provide all pertinent contract information;
- To be accepted as a Newfoundland Labrador Outfitter's Association (NLOA) member, an outfitter must hold a valid Tourism Establishment License issued by BTCRD. The license must be renewed annually and the outfitter must also adhere to the Code of Ethics of the Association;[83] and
- The NLOA perceives that outfitters are more interested in providing hunting services than angling services because they can earn greater revenue from providing hunting guiding.

Implications/Considerations

- The region boasts a long list of activity based assets but is not reaping the financial returns these assets have the potential to offer. The industry, from operators to the DMO and government must investigate ways to monetize the activity based assets in order to grow tourism revenues;
- Attention should be directed at leveraging activity based assets that are available in shoulder seasons, especially May, June, September and October. These include hiking and walking trails, birding, scenic touring/sightseeing and rock climbing among other things:
- Angling is seen by NLOA as the lynch pin to growth of the outfitter sector. In conversation with representatives from the NLOA, BTCRD, and WDMO two opportunity streams were identified to fully leverage the angling and to a lesser extent hunting opportunities: a) More emphasis on taking tourism market ready products to market, and b) Equipping outfitters in ways of providing expanded services for anglers in order to expand their business opportunities;
- BTCRD is encouraged to identify a way operators who offer/facilitate more than three activity based products or experiences can include these on their listing on the provincial website and publications;
- There are opportunities to grow the number of visitors who come to the region for angling and hunting experiences, attention needs to be directed at getting a better

[83] Spotlight Kanada interview with Keith Payne, Aug, 2014, http://myspotlightkanada.com/voices-industry-keith-paynetalksnewfoundlandlabradoroutfittersassociation/

understanding of this opportunity and ways to leverage it for the benefit of tourism outfitters and operators;

- Given regulations surrounding angling and hunting, especially related to licensing and the need (in most cases) to be accompanied by a qualified guide, steps need to be taken to better understand the opportunities and barriers present that are limiting tourism business development and growth;
- In terms of being able to connect guides to anglers and hunters, the Department of Environment and Conservation Wildlife Division maintains a central guide registry and it was intended to share this information with the NLOA and to have information available through the Department's supported visitor services programs. The current database has approximately 1100 identified guides, however, whether the database is being maintained and made available to visitors is not apparent therefore, steps should be taken to better understand the current situation in order to leverage the opportunity from the visiting angler or hunters perspective;
- Angling, specifically salmon fishing, represents a significant growth opportunity as the rivers and streams in the region have achieved notoriety for the size; trophy catches are recorded regularly, as is the large number of fish caught on any given day;
- The NLOA reports that there may be opportunity to increase visitation to the region by non-resident anglers if more outfitters offered complete angling packages that included a guide, accommodations and other services;
- Outfitters are not allowed to advertise angling opportunities in BTCRD website and publications unless they have a moose/caribou hunting license – even if they are only offering angling outfitting services like providing a guide, gear, equipment, transportation; this is limiting the gateway for guests to connect to an angling outfitting experience; and
- There appears to be a number of other barriers preventing angling from becoming a thriving tourism asset in the region and steps must be taken to address and remove these barriers including (a) the thriving underground economy which includes cash and favors for service, (b) cost of insurance, (c) challenges arise when commercial enterprises (involving angling and an accommodation option) are trying to establish themselves on Crown Land because of land use zoning issues (i.e. the land is zoned a residential/quiet cottage development area and permitting a commercial activity may not be an acceptable land use practice) and the activity is considered 'consumptive'. Presently, there is a provincial moratorium on establishing new commercial sports fishing enterprises on Crown Land.

People/Program Based Tourism Businesses

PB1: The destination has people/program-based businesses with experiential providers contributing to the visitor experience in the Destination. [YES]

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 47: Destination's Program Based Companies

Program Based Companies	# of Companies	Seasonality			# with critical acclaim		
		% Year Round	% 6 month + operation	% high season only	Provincial	National	Inter-national
Storytellers	12	92%	--	8%	3	--	--
Learning Vacations	2	100%	--	--	--	--	--
Boutique guiding companies	9	100%	--	--	--	--	--
Artisans (Crafts, Quilters, Painters)	4	100%	--	--	--	--	--
Musicians	9	89%	--	19%	3	--	--
Other	8	100%	--	--	--	--	--

Note: Additional types of activity based companies tracked in the TDVAA but not present in TDMS for Western includes Domestic Management Companies, Receptive Tour Operators and Domestic Tour Operators.

Table 48: Festivals and Event Statistics for the Destination – Demand Generators

Total Number of Festival & Events	**66**	**Length**			
		% 1-day	**% 2-3 day**	**% 4-7 days**	**% 1 week +**
Community/recreation event	48	47%	34%	16%	3%
Realistic tourism draw from -80km = NL residents: *Secondary Demand Generators*	12	24%	29%	18%	29%
Realistic tourism draw from +80km = non NL visitors – *Primary Demand Generators*	6	6%	6%	12%	76%

Table 49: Festivals and Events, Number and Attendance

Types of Festivals Events	**# Of Events**	**# Of Attendees**
Community Celebrations	48	Data unavailable
Cultural Experience	8	Data unavailable
Historical/Cultural Experience	8	Data unavailable
Music	30	Data unavailable
Performing Arts	13	Data unavailable
Sports and Recreation	12	Data unavailable
Winter	6	Data unavailable

Some events are counted in more than one category.

Table 50: Festivals and Events with Critical Acclaim

Provincial Acclaim (12)	National Acclaim (6)
The Iceberg Festival Tour de Port au Port Bike Race Stephenville Theatre Festival Soirees and Times - Anchors Aweigh Snow West Stage West Theatre Festival Marble RV Corner Brook Triathlon Corner Brook Winter Carnival Bay St. George Mi'Kmaq Pow-Wow French Historic Week The Westward Viking Festival Festival 500 Sharing the Voices - Corner Brook	Trails, Tales and Tunes Writers at Woody Point Norstead Theatre - Norstead Viking Village Gros Morne Theatre Festival Gros Morne Summer Music March Hare Festival

Note: None of the festivals and events have achieved the level of international acclaim.

Key Findings

- The region has a rich inventory of people/program-based assets compared to those reported in TDMS in the Eastern and Labrador regions. These musicians, storytellers, guides, and artists provide an authentic connection to people and place for visitors and in some cases, such as Shirley Montague, Daniel Payne and the Anchors Aweigh band, they bring provincial acclaim to a sub-region, such as GMNP, and are a destination draw;
- There are 66 annual events, the majority of which last more than three days, occur throughout the year, and six have potential to attract non-resident visitors;
- Attendance data is not often tracked, or reported for these events;
- 48 events are categorized as “community/recreation event”, they include a performing arts, culture or heritage component which is of interest to visitors;
- Six events have national notoriety, critical acclaim, and offer a unique and memorable experience (e.g. Trails, Tales and Tunes, the Writers Festival at Woody Point);
- Twelve events have Provincial notoriety, with some critical acclaim;
- Annual events utilize the skills and talent of the local people many who perform or practice their craft regularly in other venues and forums;
- The Woody Point Writers Festival attracts notable authors, organizers and patrons, many who have made the region their summer home;
- Strategic efforts in GMNP to have festivals in different communities in different months creates reasons to revisit the region and provides the opportunity to celebrate the individual communities, yet bring overall benefit to the area;[84]and
- The completion of the Rotary Arts Centre facility in Corner Brook (located on the ground floor of City Hall) enables increased performance capacity as a venue and incubator for aspiring artists intending to establish either a full-time/part-time career and/or profitable venture in the arts – considering strategic partnerships in the tourism sector for packaged product.

[84] GMNP Examples: Feb: Snow West, Rocky Harbour, May: Trails, Tales and Tunes, Norris Point, Aug: Writers Festival, Woody Point.

Implications/Considerations

- There are likely more storytellers, interpretive guides and musicians than documented in TDMS but like the other regions, they are not identified. As more guests look for and welcome encounters with these type of locals, having a complete inventory of these folks and the experience they deliver would be beneficial;
- Annual festivals and events represent a significant opportunity to grow tourism and add to the appeal of the Western region as people from away seek cultural and community encounters. Efforts to ensure those that have potential to attract non-resident travellers should be enhanced;
- An economic impact study should be commissioned to determine the impact of the main festivals and events as many request municipal or provincial funding and attract sponsors as part of their revenue stream. Understanding their full value as a tourism driver, economic generator, and contribution to community would be beneficial;
- The WDMO observes that several events have achieved some degree of success and have potential to expand their potential with the assistance of an event producer (e.g. Feather and Folk in Southwestern Newfoundland, Gros Morne Fall Fest, March Hare Festival) - the revenue base and/or economic impact however would have to cover this type of investment;
- The business model and financial support for the larger festivals that are a demand generator need to be revisited with funding partners to ensure solutions are in place to sustain their contribution, and avoid volunteer burnout; and
- Festivals and events that secure any type of government funding should be required to track and report their attendance figures.

Tourism Demand Generators, Seasonality & 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 the WDMO and BTCRD staff.

Table 51: Destination's Primary Tourism Demand Generators

Demand Generators - Primary	**Community/Location**
GMNP, Tablelands UNESCO WHS status	Gros Morne, Rocky Harbour, Norris Point, Woody Point, Trout River
L'Anse aux Meadows NHS & UNESCO WHS status	St. Anthony
Woody Point Writers Festival	Woody Point
Trails Tales Tunes Festival	Norris Point
Gros Morne Theatre Festival	Cow Head
Marble Mountain Resort	Corner Brook
Tuckamore Country Inn	Main Brook
Cape Anguille Lighthouse Inn	Cape Anguille
Western Brook Pond	Gros Morne National Park
Burnt Cape Ecological Reserve	Raleigh

Table 53: Seasonality

Type	Open Year Round	High Season Only	Open at least 6 months
Roofed Accommodations	60%	26%	14%
RV Campgrounds	0%	97%	3%
Culture-Heritage Assets	40%	52%	7%
Nature-Based Assets	41%	32%	28%
Activity-Based Businesses	36%	36%	25%
Outfitters	5%	81%	14%
Trails-Routes	61%	13%	23%
Man-made Attractions	24%	52%	24%
Retail	39%	45%	16%
Restaurants	73%	9%	18%

Key Findings

- The primary regional demand generators bring attention to, and are used to promote, travel to the entire province. Having two UNESCO World Heritage Sites in the region and a third in nearby Red Bay Labrador generates national and international awareness of the Gros Morne region and Viking Trail;
- With the exception of Marble Mountain, many of the region's demand generators are only open in the summer or high season; and
- While iceberg viewing represents an opportunity to attract visitors, cool or wet weather in the spring may serve as a detractor. In May, early June (2014) visitors wanting to see the "bumper crop" of icebergs were not able to because of the ice pack that was present in the St. Anthony Harbour.

Implications/Considerations

- The region is blessed with GMNP as one of the major iconic attractors to the province and one that can attract national and international visitors. Marble Mountain attracts residential travel in winter for skiing and snowboarding. Marketing this region to get people to visit the province/region should be continued but also strengthened by helping visitors understand the full range of visitors experiences, based on their interests, that the entire Western region has to offer; and
- The assessment team notes that there are other potential demand generators that with some development assistance and a customer centric management focus could increase travel to the region (e.g. enhancements to Marble Mountain and developing visitor experiences at Harmon Air Force Base in Stephenville).

4.2.4 Sustainability Dimension

4. This section provides a high-level assessment of Western'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. [ALMOST]

HR2: The Western region is promoting tourism as a viable career option. [ALMOST]

HR33: Where labour pool constraints are occurring in the Western region there is evidence of plans or strategies to address this challenge? [YES]

HR4: There is evidence the Western region is making investments in tourism industry training and tourism business development within the last five years (2009 – 2013). [ALMOST]

HR5: There is evidence in the Western region of succession planning for tourism businesses. [ALMOST]

Table 54: Full-time Tourism Jobs in NL

Full Time Jobs[85]	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

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

Key Findings

- The aging population in Corner Brook, as reported by the WDMO, is more pronounced due to the growing number of people who are choosing to retire there. This presents labour challenges into the future; a similar problem faced across the country in tourism. HNL is collaborating with DMOs, BTCRD and ACOA to develop a skills and knowledge development matrix and could consider collaborating with the Workforce Development Secretariat (WDS). BC recently released a Baby Boomer Toolkit[86] that focuses on solutions for employing these individuals to improve the bottom line and visitor experience;
- Human resources conversations acknowledge that many workers do not want full time work especially in rural Newfoundland. In many instances, individuals are fine working full time/part-time hours in busy high/summer season and not working through the winter months;
- Labour challenges exist now for F&B and accommodation operators. They are finding it difficult to attract and retain sufficient levels of kitchen or housekeeping staff. In addition, lodges and outfitters may have trouble attracting guides in the near future;
- While the colleges and universities offer tourism related training programs, the WDMO reports that these programs are constantly under scrutiny, not always fully subscribed, and chefs are quickly hired outside Newfoundland which limits the benefits to the province for investing in the educational programs;
- There are a number of examples where investment is being made in the interests of labour and skills development that is geared to the tourism industry. Among them are – Canada-Newfoundland Job Grants (training), the Gros Morne Institute for Sustainable Tourism (experiential travel, adventure tourism, sustainability), HNL and DMO-related workshops (customer service, market readiness, online technology), some regional CBDC sessions (accounting, bookkeeping, supply chain, succession planning), outcomes associated with the GNP Heritage Network Pilot Project (volunteer recruitment and retention, board governance), SmartForceNL – CoursePark (Online sponsored/subsidized learning by the NL government), BTCRD capacity building programs, apprenticeship and trades certification programs, other provincial-scale institutions such as the Bonavista Institute for Cultural Tourism, Museum Association of Newfoundland and Labrador, Association of Newfoundland and Labrador Archives, numerous safety training programs, among others;
- There is some evidence of succession planning, for example BTCRD's BR&E program (succession planning within the BR&E process), tourism businesses working with Community Business Development Corporations, Business Development Bank of Canada and other groups such as MUN Grenfell Campus' Navigate SME program and the Western branch of the Newfoundland and Labrador Organization of Women Entrepreneurs; and
- The NLOA released a new Best Practices for Outfitters and Guides at its 2014 AGM. This should be utilized as an effective tool for advancing the development of the profession.

Implications/Considerations

- Any tourism related HR development aimed at addressing challenges in the coming years should recognize the efforts being made currently by partners including HNL, WDMO (and other DMOs), BTCRD, ACOA among others;
- Exploring how to entice older workers to consider tourism as a semi-retirement, retired work option must be explored as they are active, good workers with a strong work ethic, and the generational mix on a staff can drive benefits to the visitor and the

[86] Go2 (2014). *Baby Boomer Toolkit: Employer's toolkit for attracting, recruiting and training baby boomers. https://www.go2hr.ca/sites/default/files/legacy/pdf/go2hr-Baby-Boomer-Tool-Kit.pdf*

business for each age cohort brings different talents, passion, and community understanding to the job; and

- Tourism operators in the region need to be creative to attract and retain good staff, consideration should be given to offering flex time, profit sharing, accommodations, ownership in decision-making, benefits through larger associations/affiliations, paid training and coursework – these are factors beyond wages, but wages need to be competitive as well.

Sales and Marketing Practices

SM1: There is evidence that the destination's tourism businesses are selling through multiple channels based on their website communications. [YES]

SM2: The destination'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 destination 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 destination invests/participates in activities that drive targeted market segments for their tourism business. [YES]

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

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

SM7: There is market demand for the range of tourism offerings that the destination is offering. [YES]

Table 55: Tour Operators Serving Western

Primary Domestic Tour Operators	Primary International Tour Operators
• Vision Atlantic • Maxxim Vacations • McCarthy's Party • Wildland Tours • Wild Women Expeditions	• Vision Atlantic • Maxxim Vacations • McCarthy's Party • Wildland Tours • Globus Travel
Secondary Domestic Tour Operators	**Secondary International Tour Operators**
• Jonview Canada (receptive) • Atlantic Tours (receptive) • Canadavac (receptive) • Linkum Tours • Denure Tours	• Anderson Vacations • Bridge and Wickers • Cox and King • Wild Women Expeditions

Note: This table only represents the major tour operators, many smaller businesses fulfilling the packaging role exist in the region.

Key Findings

- There is evidence operators in the region use a number of marketing vehicles to get to market including paid advertising/media, unpaid media and PR, online tools such as E-newsletters, blogs, Twitter, Facebook, many also buy into BTCRD and WDMO marketing efforts;
- Operators in the region, specifically most accommodators are not utilizing "booking engines" to secure reservations, in addition in most cases guests need to be on-site to purchase tickets for events and performances (there are some exceptions);
- The region is well represented by tour operators packaging travel domestically and internationally, and selling direct to market and via the travel trade; and
- There are domestic and international tour operators who sell directly to the consumer and do not use local and provincial receptive tour operators.

Implications/Considerations

- Exploring ways to make it easier for the customer to secure hotel accommodations and event/performance tickets on-line and ahead of their travel dates is needed;
- It is extremely important for marketing and sales investment at all levels (operator, municipal, and sub-regional) to be aligned. BTCRD, the WDMO, sub-regional groups, municipalities, operators and NFPs should ensure a high level of internal communication and understanding to determine who their visitors are, who their ideal visitor is, and how best to reach them and across which mediums and for what outcomes; and
- The destination's market-readiness needs to be in line with the provincial brand promise and campaign, recognizing and acknowledging this is important and needs to be reinforced at all levels keeping in mind; they are not independent of one another.

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. [ALMOST]

ESP3: There are monitoring programs that track the environmental impact of tourism. [ALMOST]

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). [ALMOST]

Key Findings

- There is evidence of environmentally responsible practices at various levels. Operator Level: Marble Inn, Seaside Suites. Municipal Level: City of Corner Brook new city hall. Provincial Parks and Protected Areas: Limestone Barrens. National Parks and Historic Sites: GMNP, Port au Choix, and LAM;
- Special permits are required for filming and familiarization tours to manage and protect certain sensitive areas in the province including provincial and national parks and protected areas;
- Snowmobiling in Gros Morne corridors are closely monitored to protect sensitive areas;
- Salmon stock monitoring is taking place throughout the region;
- Municipalities (Glenburnie-Birch Head-Shoal Brook) have been proactive in climate change adaptation planning;
- Coastal erosion and its effects on driving routes (Viking Trail), as well as archeological digs at sites such as in Port au Choix are being closely monitored;
- Anti-fracking movement is strong in western region pockets such as Gros Morne National Park area and Port au Port Peninsula/Bay St George areas;
- NLOA and partner organizations (Dept. of Environment and Conservation) work closely together to monitor and share info regarding populations of game (large and small); and
- A number of groups and organizations like the Great Northern Peninsula Heritage Network support activity that protects, cultivates and promotes the sharing the rich heritage and cultural aspects of the northern region.

Implications/Considerations

- Given the tourism significance of the region's natural landscapes, shorelines, waterways, forests and ecosystems to the tourism economy, enhancements to monitoring programs should be considered especially in light of impacts to these areas from growth in visitation;
- Fracking remains a major concern, especially when the UNESCO World Heritage Site designation comes under threat and draws negative international attention to NL. Its effects on the region's tourism assets are being monitored, any industrialization being considered or taking place within the region should be closely analyzed and its advantages weighed against identified impacts and concerns; and
- The cultivation of the region's rich history and cultural significance should be fostered both at a grass roots and organizational level; groups like the Great Northern Peninsula Heritage Network and the Qalipu Mi'kmaq First Nations Band should be supported when they are committed to protecting and passing along the history of the region.

Strategic Planning & Investment

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

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

SPI3: The destination 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 destination. [ALMOST]

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

SPI6: The majority tourism businesses can survive without government funding. [ALMOST]

Key Findings

- Numerous municipal level studies (Port aux Basques, Corner Brook, Steady Brook, Rocky Harbour, Port au Choix) have been identified that acknowledge and support tourism values and benefits to the local economy;
- Gros Morne Cultural Blueprint is a good example of strategic tourism planning within the destination;
- WDMO has a Three-Year Business Plan (2014 - 2017) and subsequent Annual Work Plans (year to year starting April 1 and ending March 31st) including marketing plan for region;
- *The Vision 2020 Uncommon Potential* provincial tourism strategy serves as a roadmap for the WDMO, Western region representatives on the Newfoundland and Labrador Tourism Board help align activities in the region year to year;
- Spring, fall and winter season extension initiatives are present throughout the region to celebrate the four distinct seasons in Western Newfoundland (Snow West, Wintertide Iceberg Festival, Trails, Tales and Tunes, Feather and Folk, Gros Morne Fall Festival, Three Bear and their respective planning groups);
- Investments have been made in the region including: Marble Mountain's new chair line, zipline, and increased business attraction/commercial land-use plans at the base, Corner Brook Port Authority and its cruise friendly operations plan, Parks Canada investment at LAM and GMNP and Port au Choix, Marine Atlantic Fleet and Port aux Basques terminal improvements, introduction of new brand hotel at Deer Lake, new investments in Corner Brook such as the Mamateek Inn (now Quality Inn) and Super 8, Woody Point Waterfront, Scott's Cove Park in Port aux Basques;
- TODS Signage is seen as a critical initiative that needs to be well articulated and supported in its communication/ implementation to industry;
- Business planning (and spending) by levy groups in the region have tourism strategies in place, these include Tourism Southwest Association, Gros Morne Co-op Association, Viking Trail Tourism Association. They have Boards or planning groups who meet regularly and consult with WDMO and others before undertaking their activities; and
- Budget cuts in 2013 to provincial and federal departments impacting tourism affected

numerous aspects of the tourism experience such as the length of season and number of programs offered at the main attraction(s) such as Parks Canada parks and historic sites.

Implications/Considerations

- Emerging levy groups are being formed throughout the region to invest and partner with operators, communities, WDMO/BTCRD on priorities for development and promotion, these activities should be encouraged; and
- Industry would like to see increased investment in infrastructure that supports tourism development (roads, wharfs, and communications infrastructure (Wi-Fi) for example).

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 destination has average year-round occupancy (40.5%, 2014) par or above the provincial average of 51% (2014). [NO]

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

KPI3: Occupancy from commercial accommodations is spread throughout the year in the destination. [NO]

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 BTCRD research division 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) for a broader snapshot of Western's tourism performance using a number of other performance indicators. In addition statistics are recorded for accommodation occupancy in the Accommodations section.

Table 56: Occupancy for Economic Zones 6-10 (Western Region)

Year	Room Nights Available	Room Nights Sold	Occupancy Rate	Room Revenue	RevPar	ADR
2014	656,403	265,819	40.50%	$31,705,183.32	$48.30	$119.27
2013	690,084	269,166	39.00%	31,446,751.58	$45.57	$116.83
2012	677,955	264,739	39.05%	$29,406,571.89	$43.38	$111.08
2011	639,598	262,946	41.11%	28,422,044.97	$44.44	$108.09
2010	650,839	271,461	41.71%	28,230,686.09	$43.38	$104.00
2009	638,642	265,773	41.62%	26,130,931.95	$40.92	$98.32
2014 by Quarter						
2014						
Q1	144,333	45,260	31.36%	5,271,138.13	$36.52	$116.46
Q2	176,217	59,922	34.00%	6,876,414.01	$39.02	$114.76
Q3	187,688	112,197	59.78%	14,097,459.03	$75.11	$125.65
Q4	148,165	48,440	32.69%	5,460,172.15	$36.85	$112.72
Year	**656.403**	**483,198**	**41.49%**	**$57,950,194.49**	**$49.76**	**$119.93**

Note: A manually compiled table based on data provided by the BTCRD titled: Occupancy REVPAR and ADR Levels for Province Western Region Zone 6 – 10 including 2014.xlxs, provided by BTCRD 15 Sep 2014.

Table 57: Provincial Occupancy 2009 – 2014

Year	Room Nights Available	Room Nights Sold	Occupancy Rate	Room Revenue	REVPAR	ADR
2014	2,648,422	1,350,227	50.98%	$180,085,301.09	$68.00	133.37
2013	2,646,525	1,365,060	51.58%	$174,370,425.12	$65.89	$127.74
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	$51.88	$107.85
2014 by Quarter						
Q1	612,800	242,454	39.56%	29,795,606.21	$48.62	$122.89
Q2	690,803	334,761	48.46%	44,534,717.92	$64.47	$133.03
Q3	729,242	492,025	67.47%	69,131,424.41	$94.80	$140.50
Q4	615,557	280,987	45.65%	36,623,552.55	$59.49	$130.34

Note: A manually compiled table based on data in the TCR spread sheet provided titled: Occupancy REVPAR and ADR Levels for Province Western Region Zone 6 – 10 including 2014.xlsx, provided by BTCRD 31 Mar 2015.

Key Findings

- The regions available room count has fluctuated 2009 to 2014 from a low of 638,642 in 2009 reaching a high of 690,084 in 2013 and currently sitting at 656,403 in 2014 indicating from 2013 to 2014 there were 33,681 less rooms available annually or 92 less room nights available each night (at an ADR of $119.27 this equals $4.0 million of room revenue annually, $10,927 per night);
- Room nights sold has remained flat 2009 to 2014;
- Room nights available by quarter varies somewhat (43,355 room nights Q1 to Q3) but there is sufficient room inventory in each quarter to accommodate travellers if demand predicated it:
- The region has experienced minimal growth in terms of roofed accommodation occupancy 2009 – 2014;
- ADR has increased from a low of $98.32 in 2011 to a high of $119.27 in 2014;
- Travel to the region occurs throughout the calendar year, occupancy varies by quarter from a high of 59.22% in Q3 (Prov. 67.9%) to a low of 31.27% in Q1 (Prov. 39.59 %). The swing in occupancy Q3 to Q1 = 27.95 percentage points (Prov. = 28.31 percentage points) and demonstrates that travel volumes by quarter match the provincial seasonality patterns; and
- Regional accommodation occupancy however in the peak travel season of Q3 is below the provincial occupancy.

Implications/Considerations

- The provincial data on Western's commercial accommodations reveals operators are lagging behind RevPar, occupancy and ADR, compared to other regions in the province;
- Commercial occupancy is driven by a combination of leisure and business travel, some regions have benefitted greatly from increases in resource based business travel and their accommodation occupancy reflects that, in the Western region, however, operators rely much more on leisure traffic and this is reflected in occupancy performance;
- Unlike some regions where business travel takes a considerable number of rooms out of the inventory and therefore impacting that regions ability to accommodate tourists and generate non-accommodation business revenues (attractions, historic sites, tours etc.) that's not the case in the Western region;
- The region has roofed accommodation capacity throughout the calendar year therefore any steps taken to grow annual visitation will have positive impact on the accommodation sector; 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.

5. Implementation Plan

What Does Implementation Look Like in the Western Region?

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 Western Newfoundland'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 Western concludes with providing development recommendations and implementation guidelines. This is the third regional TDVAA project completed (following projects in the Eastern and Labrador regions, the Central region is will be complete by August 2015 and the North Eastern Avalon region, which includes St. John's is forecasted to be complete by year end). Following acceptance of the TDVAA report a customized Opportunity Management (OM) process will be led by BTCRD 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.

Beyond the immediate action items the next step for implementing the remaining recommendations is to work through the OM process with key stakeholders to prioritize these recommendations. All parties involved in Western's TDVAA process 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 7 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

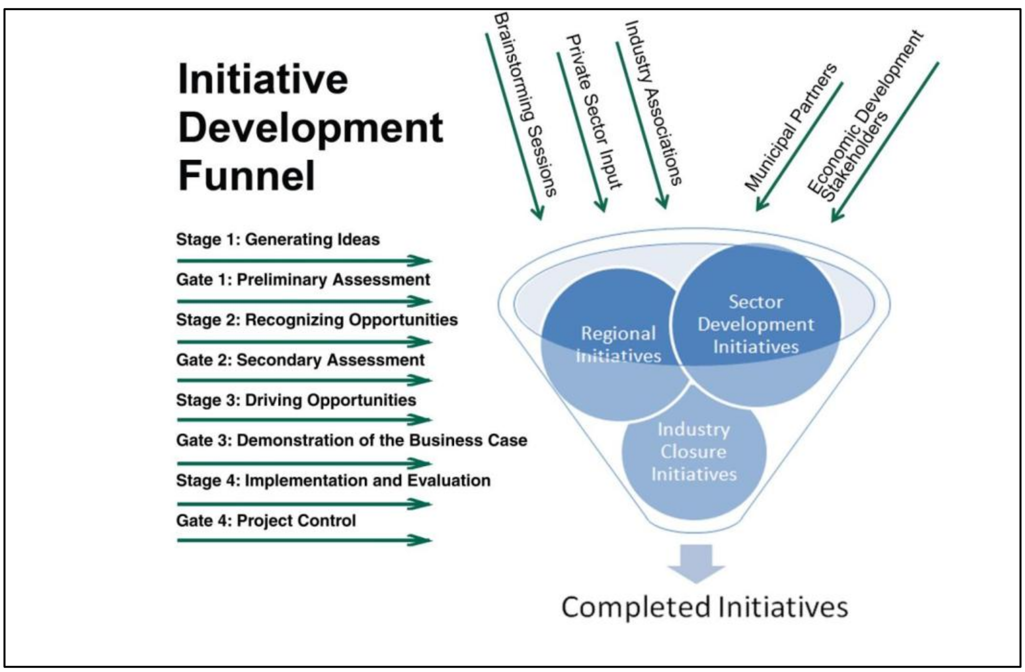
Phase 3 – Driving Opportunities

- Assigning leads, accountability, action plans and project management

Phase 4 – Monitoring & Evaluation

- Advance, Rework or Kill?

Figure 7 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 WDMO Board, Western TDVAA Advisory Committee, HNL, BTCRD, 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 58 proposes a launch sequence for consideration.

Table 58: TDVAA Implementation Launch

Task	Detail	Timing	Resp.
NL Tourism Board, HNL Board, BTCRD, WDMO approves/adopts/ accepts the study and its recommendations	HNL/BTCRD to facilitate the approval process The management team presents the study to the Boards, BTCRD, ACOA, for acceptance, approval and adoption	Summer 2015 Mtgs./ Presentations	HNL, BTCRD, WDMO
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 – 2015	Operators, WDMO, HNL, ACOA, BTCRD
HNL/BTCRD spearheads the OM process to prioritize the long-term recommendations	HNL/BTCRD facilitates a prioritization process with the, ACOA, WDMO, and Advisory Committee. NL Tourism Board is accountable for implementation; keep them in the loop	Sept – Dec 2015	HNL, WDMO, BTCRD, Tourism Board Mgr.
Reconsideration of budgets	Given that they would have been set in fall 2015	Oct – Dec 2015	HNL, WDMO, BTCRD, ACOA
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	HNL, WDMO, BTCRD, ACOA, Tourism Board Mgr.
Provincial/HNL Others Implementation	Develop list of implementation plans and deliverables with accountability to the Tourism Board	Jan 2016	HNL, WDMO, BTCRD, ACOA, Tourism Board Mgr.
Round One Implementation Roll Out	Monitor implementation activity, report quarterly on progress to Tourism Board, develop Western destination development report card to track activity and progress	Winter / Spring 2016	HNL, WDMO, BTCRD, ACOA, Tourism Board Mgr.
Destination Development Advocacy	Where advocacy is required to affect destination development implementation plans develop specific recommendation advocacy strategies	On-going	HNL

IMPLEMENTATION TASK TEAMS

Many of the recommendations specific to the WDMO 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.

The WDMO 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 the WDMO 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 Western Newfoundland 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 59: Head Start Recommendations That Can Begin Immediately

Finding	Action
1	**BTCRD, ACOA, HNL, WDMO and Operators:** Prioritize, through the Opportunity Management (OM) process, projects that: (1) have the greatest potential to attract non-resident travellers with strong consideration to those that will drive visitation to areas beyond the traditional travel hubs; and (2) give attention to the underdeveloped cultural and heritage projects found in the northern and southern tips of the region, these include projects initiated by the French Shore Historical Society, the Great Northern Peninsula Heritage Network and the Isle aux Mort's Destination Development Plan.
1	**BTCRD, ACOA, PC, Town of Rocky Harbour and the Gros Morne Cooperating Association (GMCA):** Combine the interest by the municipality to develop the Rocky Harbour waterfront with new infrastructure, ensuring plans align with the Gros Morne Cultural Blueprint, which is focused on enhancing visitor-centric experiences and activities. As the main community in GMNP, all plans should consider the integration of infrastructure, activities/services, and places for people/programming to occur to optimize revenue streams and create a hub of visitor appeal in the centre of town.
2	**BTCRD and ACOA:** Prioritize the list of funding requests that benefit projects that build on the existing infrastructure and landscapes, through product development initiatives that add activities, programs, and opportunities to connect with the locals as revenue generating visitor experiences.
3	**ACOA, BTCRD, Parks Canada (PC), WDMO, Destination Labrador (DL), Viking Trail Tourism Association (VTTA), Gros Morne Cooperating Association (GMCA), STEP Vinland and Operators:** Strike a working group of committed business leaders and operators who will step up and be willing to collaborate on developing tourism products, itineraries, and addressing hours of operation and seasonality issues from Gros Morne to Red Bay. Strategically plan a visitors journey that provides "enough to see and do" so they

	choose to make the journey between Western Newfoundland and Labrador. Use the Parks Canada EQ research to clearly define the ideal traveller type around which to develop the visitor experiences - target one or two types. In the event there are special one-time funding opportunities such as Canada's 150th celebrations in 2017, use this as a driver to ensure market readiness for pilot projects. Begin by reviewing projects already under consideration and add to this list as necessary. Then develop a prioritized list of near tourism market ready opportunities or projects.
3	**ACOA and BTCRD:** Create an experience product development funding program that invites partners, those identified in Recommendation #1, to come together and apply for funds for collaborative community and regional based tourism development (along the Viking Trail). Successful applications will emphasize development in the context of the customer journey between the identified sites, providing visitor touch points that strengthens the visitor experience and encourages creating incremental travel June to September, extends length of stay and repeat visitation.
5	**PC, GMCA, WDMO, Operators and BTCRD:** Examine together the Western region Parks Canada EQ research and Prizm data to focus understanding on the primary visitor types to GMNP and the Field Unit, then identify targeted product development projects led by Parks Canada and tourism operators to create a critical mass of experiences in June and September. Include BTCRD and WDMO travel trade representatives to ensure insights into the group market are known, and can be influenced by development decisions.
5	**PC, GMNP Municipalities and Operators:** Apply lessons learned from Synergy Louisbourg[87] and the Fortress of Louisbourg NHS in Nova Scotia in working together to grow tourism with a wide range of visitor experiences offered by both the Parks Canada Agency and local businesses. This has diversified visitor appeal, price point of visitor experiences and introduced new reasons to visit and revisit this World Heritage Site.
6	**BTCRD, Dept. of Environment and Conservation (ENVC), ACOA, PC, the Newfoundland and Labrador Snowmobiling Federation (NLSF), Local Snowmobile Clubs, Municipalities, WDMO and Operators:** The region's snowmobile and ATV trails present an immediate opportunity to stimulate business in shoulder and winter seasons. Interested operators should identify ways to fully leverage this aspect of the region's trail networks through the regional snowmobile and ATV trails working group. The first task for the group is to prioritize those activities that must be implemented in the next 12 months in order to grow business revenues.
7	**WDMO, BTCRD, NLOA, Outfitters and Operators:** Gather tourism leaders who recognize angling as a growth opportunity and, where applicable, work in partnership with the NLOA to learn from the BR&E study in order to facilitate a process that assesses the strengths, gaps and challenges in the current offer. Develop a prioritized list of actions that capitalize on the strengths and addresses the weaknesses while enhancing the appeal of the Western region as a must visit angling destination for non-resident avid anglers.
7	**WDMO, BTCRD, and NLOA:** Take a proactive role in helping outfitters understand how to move beyond 'listings' to effectively convey the experience differentiation, enhancing the call-to-action, and closing the sale relative to today's consumer expectations.
7	**WDMO, BTCRD, NLOA and Outfitters:** Determine if there is merit in profiling salmon as the regional unique selling proposition, which would complement the TDVAA Labrador recommendation to focus on big trout in the north.

[87] Arsenault, N. and Payne, D. (2014). *From a dead end … to a destination.* A case study on a successful path to revitalizing tourism at the destination, complete with community pride, new investment and new visitor experiences. Downloaded: https://www.scribd.com/doc/244667997/From-a-Dead-End-to-a-Destination-Synergy-Louisbourg-Community-Engagement-Tourism-Case-Study

8	**HNL and Tourism Quality Assurance NL Inc. (TQA):** Establish upgrade targets that monitor progress of the number of properties that improve their star rating.
9	**WDMO and Operators:** Form a winter tourism steering group of businesses and organizations that will benefit from an enhanced, coordinated approach in developing winter tourism products. Focus on mobilizing operators who have tourism market ready or near tourism market ready winter experiences. As part of this approach evaluate the viability and sustainability of Snow West festival.
9	**NLSF, WDMO and Operators:** Focus product development and marketing activities to attract avid outdoor recreationalists interested in trail and back country snowmobiling.
10	**WDMO, GMCA, and Corner Brook Facility Managers:** Prepare a regional booking calendar that tracks future need periods over a 3 to 7 year period against the backdrop of current business currently on the books including leisure, travel trade, cruise, and sports bookings for Corner Brook and GMNP/Rocky Harbour. Then, develop a set of promotional and sales tactics that will lead to increased conference business from the each sector. This includes leveraging the size of events suited to facilities in Corner Brook and GMNP/Rocky Harbour and leveraging its unique location and surrounding tourism assets.
13	**BTCRD, ACOA, Transportation Providers and Operators: Provide tourism performance data that delineates the non-resident vacation traveller from other categories of travel. More specifically, provide delineated performance data pertaining to non-resident air and ferry arrivals, car rental and roofed accommodation occupancy.**
15	**WDMO, various levy groups, PC, BTCRD and ACOA:** Host an annual, or bi-annual meeting, through the WDMO to discuss the potential for leveraging investments for product or market development initiatives, and promotional activities that would benefit the visitor in more than one jurisdiction. Any region-wide collaborative strategy must keep the customer at the heart of the respective strategies and collectively drive guests down a coordinated “path to purchase” avoiding duplication of efforts, resources and visitor messaging. An expected degree of transparency and accountability for both the collection and the allocation of these funds will be important every step of the way.
15	**WDMO, BTCRD, ACOA and HNL:** Where appropriate, support the efforts of industry stakeholders who want to establish a levy group within their respective areas and provide guidance in how to align the use of these auxiliary funds to drive visitation, overnight stay and growth in tourism receipts.
16	**HNL, GMCA, PC and WDMO:** HNL leads the communications with the GMCA and the WDMO to extend the message to keep tourism stakeholders within the region, and in particular those in GMNP and the Port au Port Peninsula/Bay St George area appraised of the activity associated with discussions or movement on the fracking issue, when needed mobilize people within these communities to make deputations and speak in favour of protecting the natural assets.
16	**HNL and the NL 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.
17	**BTCRD and DMOs:** Explore the potential to include experience providers that are registered businesses, TAP approved and would add richness to the visitor opportunities. And simultaneously consider if there is a B2B option whereby individuals, who are not registered businesses nor TAP approved (e.g. artisan, musician, storyteller, and guide) could be listed and make their services available to tour operators and businesses who would contract their services, as a TAP approved company.

17	**BTCRD and DMOs:** Revisit the role of regional DMOs in supporting the monitoring and accuracy of the TDMS system, for they are closer to the businesses, know when new companies began, others are sold or close their doors to keep it as accurate as possible.
17	**BTCRD:** Explore the affordability and practicality of a real-time system, whereby operators can join at any time, and update their company profile at any time to ensure visitors are optimally served.
18	**Operators:** Review your website to determine where you can add photos of visitors engaged in activities that bring your business to life. Ensure your call to action for direct sales is evident, and if you work with the travel trade and/or travel media and would like to attract this type of interest, you have information and a call to action on specific landing pages. Investigate online reservation systems, 75% require "how to get here information", and for the 42% that do not accept electronic payment, explore the growing number of options from traditional credit card companies, to PayPal to Square (as a few examples).
18	**Operators:** Understand the importance of having an accurate and complete business listing on the provincial tourism website and in the travel guide, many operators are missing the mark here, TAP approved operators can optimize their presence by completing the appropriate paperwork to be included, this will differentiate your business and drive the sale.
18	**Operators, Municipalities and the WDMO:** Operators without a website should move to invest in one by the fall of 2015. Of the vast majority with a website, visit the provincial YouTube channel (http://www.youtube.com/user/NewfoundlandLabrador) and the Canadian Tourism Commission (http://www.youtube.com/user/canadiantourism) to determine if there are any videos that are aligned with your product, story, community or region that you can hyperlink, to add high-quality, professionally produced videos to your website.
18	**HNL, WDMO and Operators:** Increase number of tourism operators with TripAdvisor accounts by reinforcing its importance and encouraging participation on training programs to help people jump the digital divide and know how to interact, respond and resolve conversations with visitors.
20	**HNL, BTCRD and the WDMO:** Re-confirm the sector groups that are having issues meeting these two particular TAP standards and determine which collaborative actions across the tourism development-related organizations are required to assist. Special consideration may need to be given to the people/program/festival and event sectors that are vital to raising the bar on the visitor experience and the value of different activities, but do not generate the volume full-time operators/registered businesses do. The hope is to identify among the partner groups an agreed on methodology that realizes efficient solutions.
20	**HNL, BCTRD, TQA and the WDMO:** HNL should develop a visible symbol that recognizes TAP approved businesses that clearly identifies these operators to the public and to other operators. Examples from the Better Business Bureau, Canadian Signature Experperience programs use tools such as logos, stickers, website identifiers, etc. BCTRD and the WDMO should provide marketing incentives or recognize these companies in some way to increase the critical mass of operators who shift from non-approved to approved.
21	**Tourism Board:** Consider amending five *Vision 2020* goal statements

Appendices

Appendix 1: Contributing Stakeholders

The following individuals contributed to the TDVAA process for the Western 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 Business, Tourism, Culture and Rural Development, 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:

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

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 BTCRD and HNL. The WDMO / BTCRD team was:

- Mark Lamswood, Executive Director, Western Region DMO
- Brittany Taylor, Marketing & Administration Coordinator, Western Region DMO
- Paul Taylor, Tourism Development Officer, Business, Tourism, Culture and Rural Development, Government of Newfoundland and 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, Chief Executive Officer
- NL Tourism Board, Lynn Taylor, NL Tourism Board Manager
- BTCRD, Scott Andrews, Manager Strategic Tourism Product Development, Chris Tuck, Tourism Product Development Officer
- BTCRD, 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 60) 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 60: TDVAA Western Newfoundland Committee Members

Name	Organization(s)	Sector
Mark Lamswood	Go Western Newfoundland - Staff	DMO, NFP
Brittany Taylor	Go Western Newfoundland - Staff	DMO, NFP
Laura Walbourne	Go Western Newfoundland - Staff	DMO, NFP
Ed English	Go Western Newfoundland – Board (Chair), Marble Inn, Quirpon and Cape Anguille Lighthouses, Linkum Tours, VTTA, TSW	Various; Private Operator, Accommodations, Adventure Tourism, Receptive, Levy
Chris Beckett	Go Western Newfoundland – Board (Vice Chair), Marble Mountain	DMO, Private/Public, Ski Resort and Accommodations
Todd Wight	Go Western Newfoundland – Board (NL Tourism Board Rep), Ocean View Hotel, Gros Morne Co-op Assoc(GMCA)/Gatherings	Various; DMO, Private, Accommodations, Levy
Cynthia Randell	Go Western Newfoundland – Board, Grenfell Historical Properties, VTTA	Various; DMO, NFP Attraction(s), Levy
Ian Stone	Go Western Newfoundland – Board, GMCA/Gatherings, Parks Canada (WNLFU), Town of Norris Point	Various; NFP, Levy, Municipal
Darel House	Go Western Newfoundland – Board, GMCA/Gatherings, Shallow Bay Motel, VTTA	Various; Private, Accommodations, Levy
Scott Ryan	Go Western Newfoundland – Board, Days Inn Stephenville, Tourism Southwest (TSW)	Various; DMO, Private, Accommodations, Levy
Lloyd Hollett	Go Western Newfoundland – Board, Newfoundland Insectarium	DMO, Private Attraction
Cathy Lomond	Go Western Newfoundland – Board, Hotel Port aux Basques, Tourism Quality Assurance of NL, TSW	Various; DMO, Private, Accommodations, Levy
Kim Vokey	Parks Canada (Western N and Lab Field Unit – WNLFU), WDMO Ex-officio	NFP, Parks Canada
Randy Letto	Destination Labrador	DMO (Labrador), NFP
Natasha Hynes	Viking Trail Tourism Association (VTTA)	Great Northern Peninsula - Levy, NFP
Katherine Lockhart	Creative Gros Morne	NFP, Cultural Programming
Gaylene Buckle	Theatre Newfoundland and Labrador (Gros Morne Theatre Festival)	NFP, Theatre
Paul Wylezol	International Appalachian Trail NL (IATNL), Cabox Proposed Geopark	NFP, Trail Development

Peter Antle	Greenwood Inn & Suites Corner Brook, HNL, Hotel-Motel Association NL	Various; Private, Accommodations, NFP
Joan Simmonds	French Shore Historical Society, Great Northern Peninsula Heritage Network	NFP Attractions
Ruth Forsey-Gale	Tourism Southwest, Pirates Haven Adventures	Various; Private, Accommodations and Outdoor Adventure, Angling, Levy
Nora Fever	Corner Brook Port Corporation, Cruise NL	Cruise
Cory Foster	Newfoundland and Labrador Outfitters Association	NFP, Outfitting

Appendix 2: Glossary of Terms

Source of most definitions: Department of Business, Tourism, Culture and Rural Development (BTCRD), and the Tourism Industry Association of Canada (TIAC).

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

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.

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

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.

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.

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.

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.

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

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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

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.

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".

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.

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.

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.

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.

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.

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.

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.

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.

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: Vision 2020 Alignment Summary

There are seven areas of investment with 16 goal categories in the *Vision 2020* (Table 61). The alignment of each of the 18 major findings from this study is identified in Table 62.

Table 61: *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 62: Western Region's *Vision 2020* TDVAA Recommendations Alignment

Finding	*Leadership*	*Transport*	*Research*	*Product/ Experience*	*Technology*	*Marketing*	*HR*	*Core*
1	1.3			4.1, 4.3				
2				4.1		6.1, 6.2	7.1	
3	1.2			4.1	5.1	6.1, 6.2, 6.3		
4		2.2		4.2				
5	1.3			4.1, 4.2, 4.3		6.1, 6.2, 6.3	7.1	
6	1.3			4.1, 4.2, 4.3		6.2, 6.3		
7				4.1, 4.3		6.1, 6.3		
8				4.1, 4.2				
9			3.1	4.1		6.1,6.2		
10						6.3		
11				4.1, 4.2	5.1	6.3		
12				4.1			7.2	
13								X
14			3.1				7.1	
15	1.2					6.1, 6.3		
16			3.1					
17			3.1					
18			3.2		5.1	6.1, 6.2, 6.3	7.1, 7.2	
19			3.1					
20	1.2, 1.3					6.3		