Central

Tourism Destination Visitor Appeal

Strengthening the Potential





HOSPITALITY NEWFOUNDLAND & LABRADOR

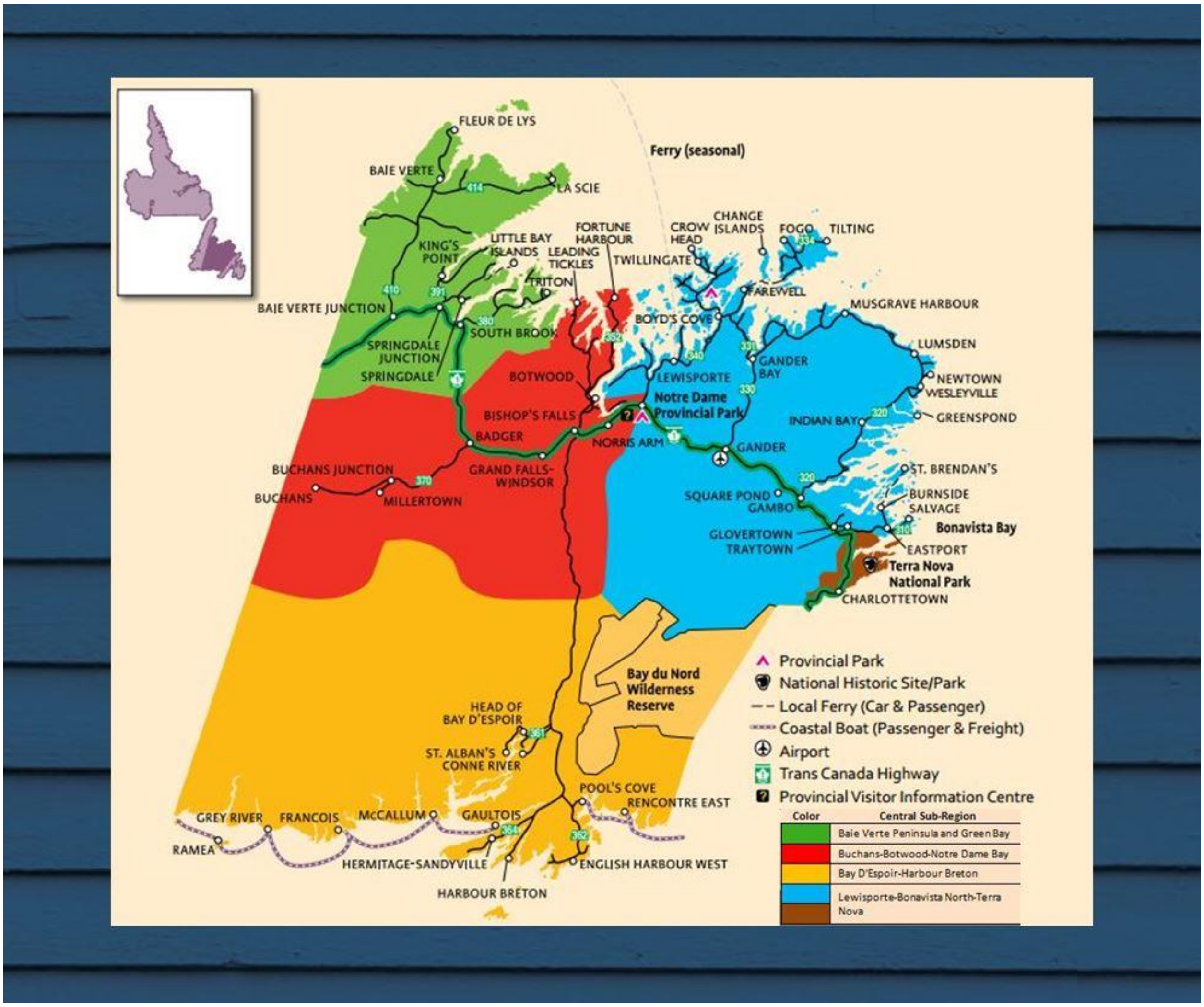
Adventure Central Newfoundland

Newfoundland Labrador

Atlantic Canada Opportunities Agency
Agence de promotion économique du Canada atlantique
Canada

Conducted by: The Tourism Cafe   BRAIN TRUST Marketing & Communications

Map of the Central Region



Executive Summary

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

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

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

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

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

Designed to take a visitor-centric approach, this study reviewed 234 documents, reports and studies combined, plus data from the Tourism Destination Management System (TDMS) and Restaurant Association of NL's (RANL) e-dining databases. New variables were added to the primary data collection that was supported by ACN and BTCRD. This 13-month process (Oct 2014 – Nov 2015) incorporated insights from community and online stakeholder sessions from January 12th – 19th, 2015 for the launch the project, an online stakeholder questionnaire from January 22nd – 31st, a return to the Central region follow-up stakeholder sessions April 20th – 27th and concluding with various Advisory Committee and government stakeholder sessions to refine the recommendations.

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

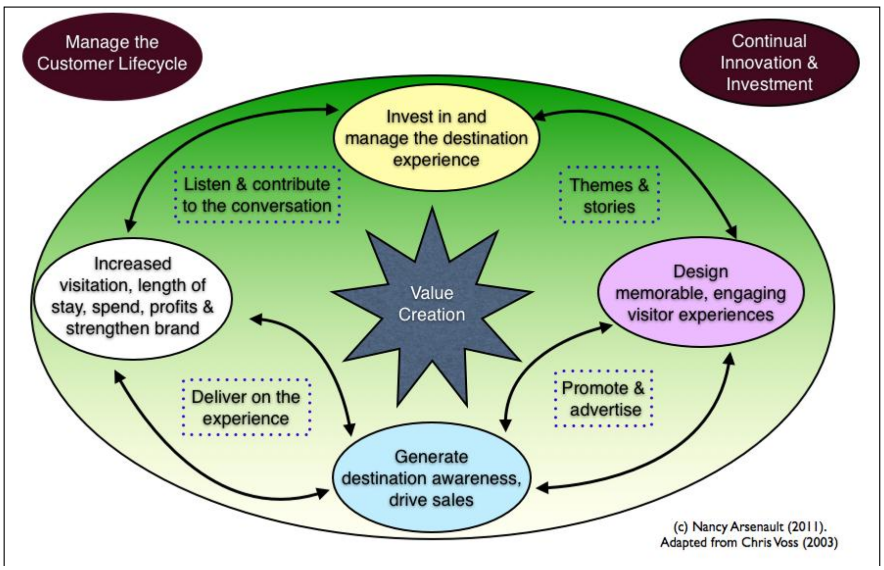
1. **Reports**, plans and research documents, and projects-in-the-pipeline.
2. **Visitor profile information** and three customer engagement tools for tourism services and attractions and municipalities: Websites, Facebook and TripAdvisor.
3. **Product and market** dimensions which included primary and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

Benefits of the Assessment

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

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

Figure 1: The Tourism Experience Investment Cycle



In the Central region this is critical for tourism-based projects, but also the many regional development initiatives that benefit people, communities and visitors alike, such as the strengthening inter-community collaboration with a visitor focus, continuing to invest in key experience development and targeted infrastructure products, raising the bar on the quality and services in the region and optimizing the online presence of businesses and municipalities. All of these initiatives will have an impact on tourism to a greater or lesser degree and have been considered in this Central region 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

Sixteen 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 13-month process. Each key finding, detailed in Chapter 3, is supported by tactical actions that provide the foundation for operators, municipalities, ACN, BTCRD, the Atlantic Canada Opportunities Agency (ACOA), HNL and others.

Finding #1: Long-term strategic, sustainable growth in the Central region requires strengthening inter-community collaboration, enhancing customer service, and developing new products and experiences that are aligned with the Newfoundland and Labrador brand.

Finding #2: Bed and Breakfasts, Cottages and Inns offer high quality accommodations with hosts providing authentic, emotional connections to visitors who want to get off the beaten track and explore rural Newfoundland.

Finding #3: A celebration of coastal communities by land and sea represents an opportunity for targeted marine and land-based visitor experiences to be aligned and marketed.

Finding #4: The Central region has tourism products that offer targeted year-round visitor opportunities.

Finding #5: Significant infrastructure investments in the Central region are foundational to the long-term growth, competitive appeal, and visitor experience.

Finding #6: There is an opportunity to raise the bar on the culinary experience through specific menu adaptations.

Finding #7: Trails are an integral part of the Central region visitor experience; identifying solutions to generate revenue and broaden the visitor experience will contribute to their long-term sustainability.

Finding #8: A more concerted effort should be made to create group and independent travel packages to sell through the various distribution channels.

Finding #9: Learning from the Shorefast Foundation’s Community Host Program and embracing the principles of practice in other communities represents an opportunity to build on a successful business model in the region.

Finding #10: Communities and tourism stakeholders need to ensure responsive visitor services exist throughout the region.

Finding #11: The number of existing unique galleries could raise the bar on the visitor experience by adding a program dimension to their current retail offer.

Finding #12: Tourism businesses and municipalities are not fully optimizing their online presence; targeted training represents an opportunity for increased visitation and revenue.

Finding #13: Select outfitting lodges could attract new business by diversifying beyond their traditional product offer and target markets.

Finding #14: Collective efforts in addressing the emerging opportunities and challenges with the Tourism Assurance Plan (TAP) should be a short-term priority.

Finding #15: TDMS and e-dining databases have limitations, which are being addressed; continued effort will benefit visitors, operators, and the province and contribute to achieving the goals outlined in *Vision 2020.*

Finding #16: Amend five *Vision 2020* goals to optimize the investment focus needed to achieve the desired outcomes.

Implementation

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

The second step is to put the recommendations through BTCRD's Opportunity Management process (OM) so that ACN, BTCRD, HNL, 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 ACN Board and the TDVAA Advisory Committee. An annual review by HNL, BTCRD, and ACN will allow for year-to-year monitoring of the progress and adjusting to evolving realities as time passes and new learning during implementation occurs.

Photo:The Gathering Credit: Peter Andrews

Photo: Change Island Pony Reserve Credit: Trevor Lush

Photo: Coast of BaysArts and Exploration Centre Credit experiencent.com

Table of Contents

1. An Investment in the Future

In 2009, the tourism industry and province of Newfoundland and Labrador (NL) released their vision to double tourism revenues to $1.58B by 2020. Titled, *Uncommon Potential: A Vision for Newfoundland and Labrador Tourism (Vision 2020)* [2], 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 vision for the future requires the collective will of many stakeholders collaborating to compete to achieving the desired outcomes.

The Central region offers an appealing range of outdoor adventure experiences from iceberg and whale watching, snowmobiling and hiking. When the geological, cultural, artisan, and heritage assets are added, the appeal broadens and the potential to connect with locals deepens. The rich aboriginal history dates back 5,000 years with the Maritime Archaic tradition, Dorset Palaeo-Eskimo culture, and the more recent aboriginal cultures, including the Beothuks and the current Mi'kmaq First Nations reserves. Twillingate, Terra Nova National Park, and the award winning 5-star Fogo Island Inn attract and welcome domestic and international travellers alike while contributing to the diversity of the region.

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 the real character of the people, a rich history, heritage and culture, and the natural environment that enjoys 29,000 km of coastline and icons.[3] The Central region is an integral part of any NL experience with its own unique appeal and destination drivers, including the opportunity to arrive by air directly into the renowned Gander International Airport.

Contributing to *Vision 2020*

One of the key strategic directions in *Vision 2020* is strategic direction #4, product development, 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 Central Newfoundland that must be addressed in developing products and experiences that will generate new revenue for businesses and memorable value for guests.

The Central region is comprised of 85 municipalities and 48 service districts with Gander and Grand Falls - Windsor being the largest communities. The region has a rich history of coastal communities and resettled communities along the north and south coasts and invites travellers who enjoy getting off the beaten track and out of the major cities to expand and enhance their journey by exploring the Central region.

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

A long-term vision is required to further develop the tourism potential, for one of the greatest challenges the region faces is encouraging visitors to travel north or south off the Trans-Canada Highway.

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 would like to see increased benefits from tourism. A primary goal of the process is to help operators and communities, that have not realized their full tourism potential, understand ways to enhance their offer and appeal and encourage operators to leverage their strengths beyond the traditional summer travel period in ways that:

- Resonate with travellers, reinforce the brand and increase the return on investment;
- Continue to improve the visitor experience; and
- Allow operators to become more sustainable.

Purpose of the Project

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

HNL, BTCRD, ACN and ACOA, have engaged in a formative review process to assess the Central region of Newfoundland's visitor appeal and identify gaps and opportunities, and ensure alignment for destination investment and development with all Tourism Board partners over the near and long-term.

Brain Trust Marketing and Communications and the Tourism Cafe Canada were contracted to develop a customized assessment approach that engages the destination management organizations in data collection and a process for engaging stakeholders at multiple touch-points through this process that began in October 2014 and concluded in November 2015.

Acknowledgements

The Central region of NL is the fourth destination to complete the TDVAA process. Special thanks are given to ACN, BTCRD and HNL, plus the TDVAA Advisory Committee for their various roles in supporting data collection, analysis, hosting stakeholder meetings, reporting, ensuring local area insights are considered and facilitating stakeholder validation sessions.

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

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

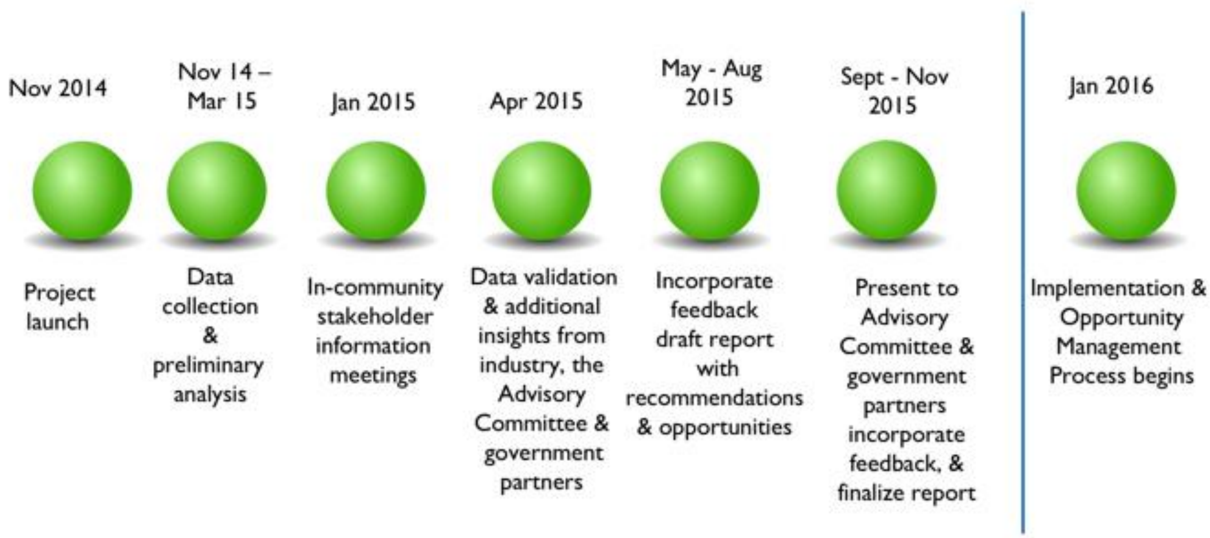
Chapter 4 provides detailed information that was gathered, and consolidated, as one of the major sources of information of the report. It begins with a Tourism Barometer to position Central NL within the provincial, national and international context. The lengthy data insights begin with a high level summary of the key dimensions. This is followed by a discussion of each dimension, key findings, a series of bullets that extract highlights from the data, and includes related qualitative inputs from the stakeholder consultation and validation sessions. Finally, implications and considerations are provided and represent the researcher team's interpretation of the information based on analysis, team discussions and multiple touch-points with stakeholders.

Chapter 5 describes implementation, includes a brief synopsis of the BTCRD Opportunity Management (OM) 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, (4) *Vision 2020* alignment summary.

Project Timeline

Figure 1: Project Timeline



2. The Destination Assessment Framework

2.1 What is a Tourism Destination Visitor Appeal Assessment?

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

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 region's assets and attributes is vital to identifying priorities for investing in product development that best delivers on the provincial brand promise.

The TDVAA is based on a formative assessment of a wide range of primary and secondary data sources and qualitative inputs from community stakeholder and online meetings, follow-up interviews, validation sessions, and a review of the preliminary findings. Emerging from this process are key findings, recommendations and opportunities (Chapter 3) that inform Central Newfoundland'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.

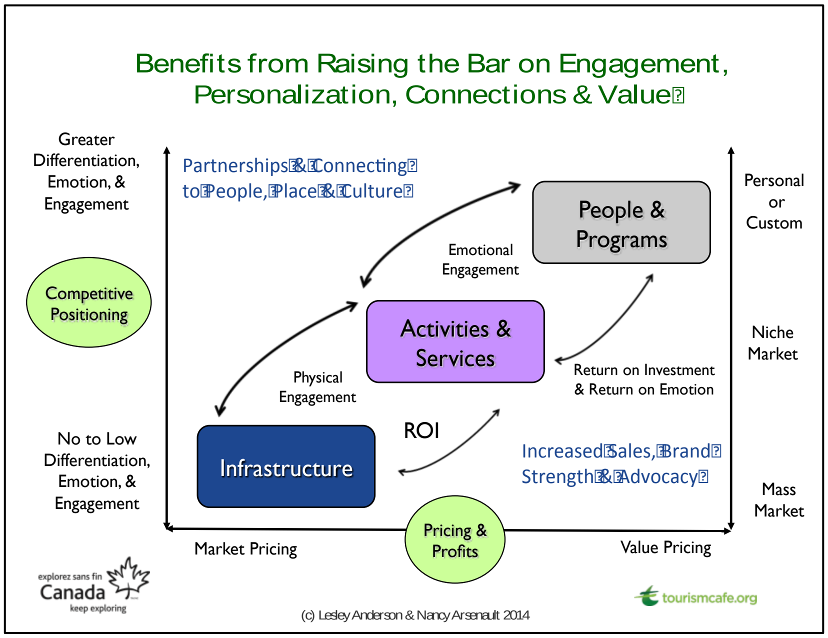
Photo: Rafting on the Exploits River with Rafting Newfoundland
Source: flickr.com/photos/newfoundlandlabradortourism

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

2.2 The Conceptual Framework Underpinning the Study

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

Figure 2: Raising the Bar on Value to the Visitor



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 the Central region.

In the tourism industry, 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 travellers ability to holistically enjoy and engage with the special people, places and cultures that a destination, such as Central Newfoundland, has to offer.

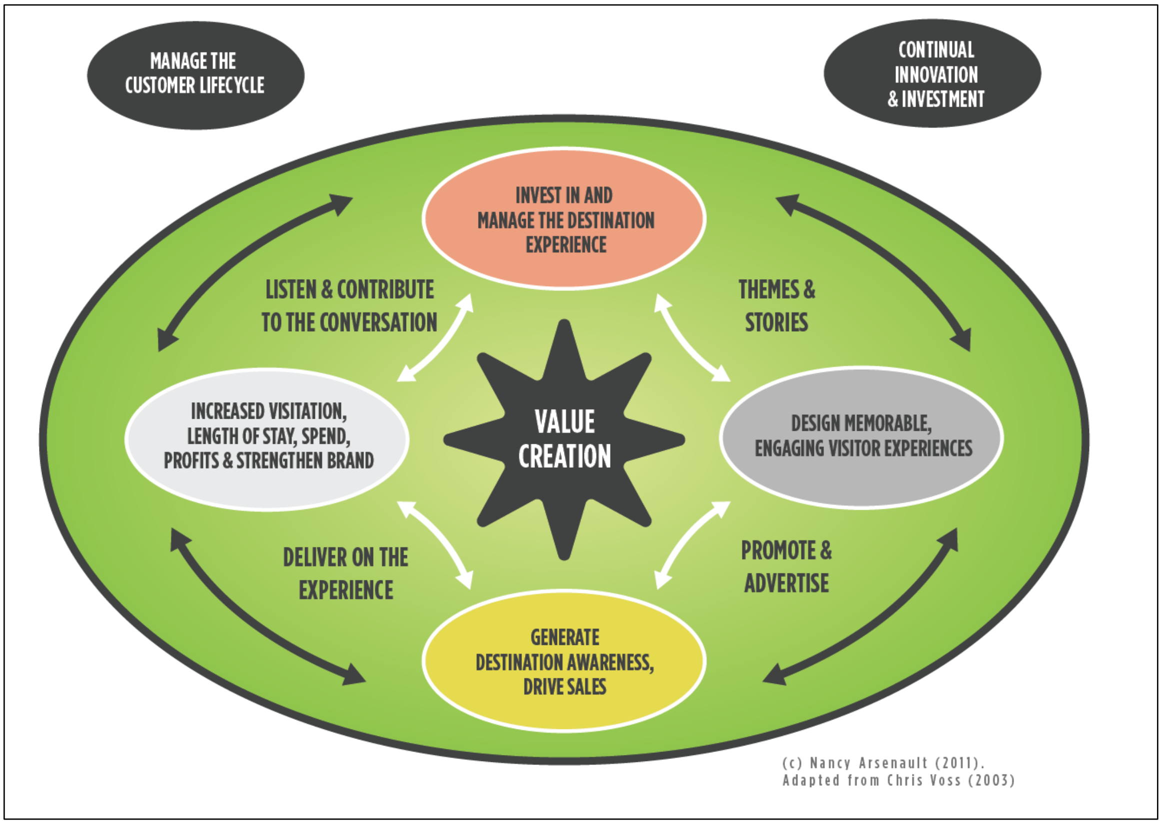
- ***Infrastructure based businesses*** have high fixed costs, require volume and/or base funding to build, maintain or preserve the facilities, hence they focus on the mass market with targeted niche markets to drive business. Examples include hotels, historic sites, parks, attractions, theatres, restaurants, 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*** have fixed costs related to a particular type of activity, but compared to the infrastructure category; the capital investment is much lower. They require steady volume and often cater to niche markets and smaller groups as often some skills or equipment associated with the activity is required. Examples include whale watching or kayaking companies, tour operators, and outfitters.
- ***Program and people based businesses*** have 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 include 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 the Central region are aligned in ways that optimize the tourism experience investment cycle (Figure 3).

Figure 3: The Tourism Experience Investment Cycle



The visitor economy has a broader focus than that of the typical perception of a 'tourist'. Rather, 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.

Specifically, the benefits from this study include:

- An understanding of Central Newfoundland'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 Central Newfoundland; and
- An engaged industry in the discussions, outcomes and implementation requirements for the study.

Photo: Dorset Soap Stone Quarry National Historic Sites in Fleur de Lys
Source: newfoundlandlabrador.com

2.3 Methodology

The TDVAA uses a formative evaluation research methodology. Informed by both qualitative and quantitative data sources, preliminary findings emerge that are shared with stakeholder to gather their insights and feedback at multiple touch-points to ensure the research team 'has heard correctly, interpreted the data accurately' based on the information available. This allows for 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 Central region TDVAA the touch-points included:

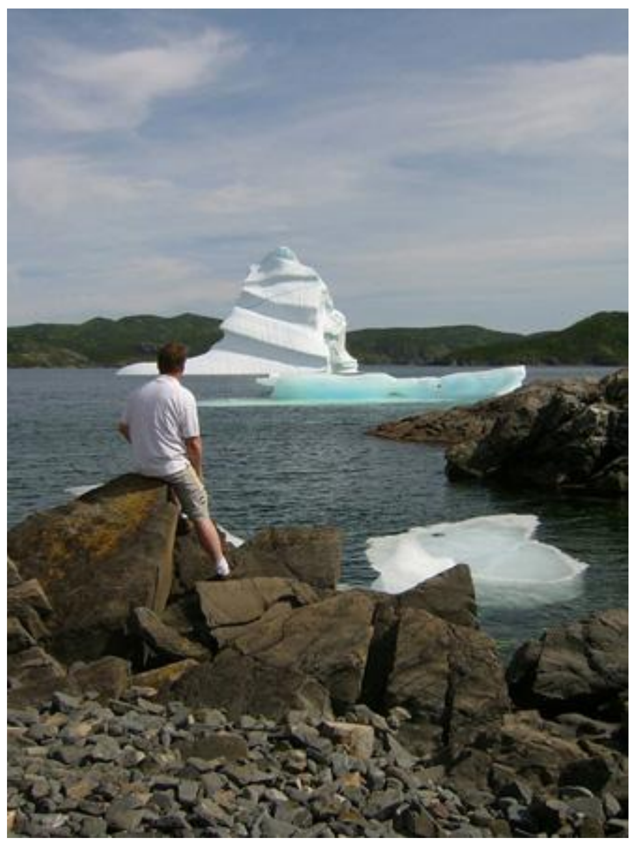
- Establishing a TDVAA Advisory Committee;
- Hosting community and online presentations to inform industry stakeholders of the project;
- Engaging data collectors from the province and Central region who provided the quantitative input as well as the reports, documents and studies that could impact the project;
- Inviting stakeholders to contribute via an industry survey;
- Participating in on-going meetings with the TDVAA Advisory Committee, Regional Destination Project Leads, and Project Sponsors, 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 ACN, HNL and BTCRD, then via presentations to the TDVAA Advisory Committee, government representatives, and in-community presentations with industry stakeholders;
- Formulating the key findings, opportunities and recommendations, again securing detailed feedback and reflections from ACN, BTCRD and HNL before presenting them to the TDVAA Advisory Committee and government representations via an online presentation;
- Preparing a draft report for ACN, BTCRD and HNL's review and input; and
- Finalizing the report.

Data Sources

Multiple data sources informed this report:

- 234 Reports, plans and documents – see Appendix 3;
- Data from the Tourism Data Management System (TDMS) and Restaurant Association of Newfoundland Labrador (RANL) e-dining databases supplemented by additional variables;
- An online industry survey, 83 out of 656 businesses responded. While this low response rate (12.6%) cannot be considered statistically valid, a review of the responses and feedback does provide helpful insights;
- Seven in-community industry stakeholder meetings to launch the project (Jan 12 – 15, 2015);
- Seven in-community industry stakeholder meetings to validate the preliminary findings (April 20 – 24, 2015);
- Eight special purpose interviews/follow-up community session conversations (April – May);[6]
- Two online industry stakeholder meetings. One to launch the project (Jan 19, 2015) and one to validate the preliminary findings (Apr 27 2015); and
- Multiple online meetings and presentations with ACN, the TDVAA Advisory Committee, BTCRD, HNL, and special sessions with ACOA.

Photo: Iceberg watching, Leading Tickles
Source: flickr.com/photos/newfoundlandlabradortourism



[6] Reg Wright (Gander International Airport Authority), Mark McCarthy (McCarthy Tours), Julie Curran (Maxxim Vacations), Charlotte Jewczyk (BTCRD), David Hyashida (Kings Point Pottery), Roger Burt (By the Sea), and Pauline Payne (Fogo Island Inn).

The data was organized into five dimensions that together, provide a holistic assessment (Table 1). A glossary of terms for the project is included in Appendix 2. Appendix 3 provides a bibliography of all secondary sources considered.

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 tourism (secondary data).
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 TripAdvisor 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.

2.4 Project Scope and Limitations

The scope of TDVAA is regional. It does not include a sub-regional analysis or focus on individual businesses. Recommendations, actions and opportunities are aimed at the regional level, which when combined with the other four regions (Western, Eastern, Labrador, and North East Avalon) will present an aggregate understanding at the provincial lens to complement the regional reports.

Implementing the recommendations will vary depending on the tourism operator or agency leading (e.g. ACN, HNL, BTCRD, ACOA, etc.).

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 TDVAA advisory committee, industry and government stakeholders participate in the community industry stakeholder meetings, online survey, preliminary finding validation sessions and the 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 documents relative to the time and budget for the project;
- The variables within the databases accessed that inform the study (TDMS and e-dining);
- *Special Note:* Stakeholder feedback received during the in-community sessions revealed that they wished the membership list from the Craft Council of Newfoundland and Labrador and the NL Arts Council database had been included within the scope of this study given the importance of this community to the region and their potential to increase their engagement with the tourism industry and their positive impact on the visitor experience;
- Interpretation of what constitutes a ‘project in the pipeline’ relative to its 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; and
- Budget and human resources available.

2.5 Opportunity Management

Once the report is accepted by HNL, BTCRD and ACN, taking action on the short-term recommendations that impact individual businesses or organizations can occur. Larger projects that require multiple partners and funding agencies are reviewed using a customized Opportunity Management (OM) process to help set priorities and align stakeholders for action and implementation.

Photo: Conne River Powwow
Newfoundlandlabrador.com

3. Key Findings & Recommendations

> "I've waited since 1988 for this type of approach to support tourism development. I feel hopeful that it has finally started because those of us in the industry have known for years, we need product just as much as marketing"
>
> Industry stakeholder at the Gander Validation Meeting 22 April 15

Tourism in Central Newfoundland is vast, diverse and celebrates everything 'Adventure Central'. With a focus on enjoying the outdoors, residents and non-residents alike will delight at the annual lure of Iceberg Alley as six types of icebergs float down from Greenland and 22 species of whales entertain visitors watching from the land and from the sea.

A hiking and snowmobile mecca, trails abound throughout this historic region where fishermen settled and fished for years. The Beothuk aboriginal history is rich in the area and the Dorset Palaeo-Eskimo Soapstone Quarry in Fleur de Lys was designated a National Historic Site in 1982 for its scientific value as the oldest soapstone mine in North America. Many famed artists call the Central region their home from actor Gordon Pinsent, to musicians Kevin Blackmore from Buddiwasisname, and comedian Shaun Majumder. Communities celebrate their culture and welcome thousands of guests annually to the region to participate in a wide range of unique festivals. Terra Nova, Newfoundland's first National Park, welcomes guests into a boreal forest with a rich cultural history, an abundance of wildlife, exceptional scenery and recreational activities. And, an active outfitting industry takes pride in their rivers and streams where some of the best salmon angling in the world can be found.

Core to strengthening the success of the Central region are the collaborative efforts needed between businesses and communities to lure travellers off the Trans-Canada Highway between St. John's and Gros Morne. Whether they are outdoor enthusiasts, people seeking art, music, culture, or a touch of rural Newfoundland, ensuring there are consistent services and experiences throughout the region that meet the needs and expectations of resident and non-resident travellers is critical for the success of seasonal and year-round businesses.

Summary of the Key Findings

Stakeholder participation in the TDVAA has been strong and has generated important insights from a diversity of perspectives, at multiple touch points, during the 13-month process.

Sixteen aggregate key findings emerged from the Central region based on a synthesis of various 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, ACN, HNL, BTCRD and ACOA. 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 represent 'Head-Start Tactics' that can begin more immediately, while the remaining elements are prioritized through an 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 revisited when considering destination development activities and initiatives for Central Newfoundland. A more complete description of the process is found in Chapter 5.

KEY FINDINGS

Finding #1: Long-term strategic, sustainable growth in the Central region requires strengthening inter-community collaboration, enhancing customer service, and developing new products and experiences that are aligned with the Newfoundland and Labrador brand.

Finding #2: Bed and Breakfasts, Cottages and Inns offer high quality accommodations with hosts providing authentic, emotional connections to visitors who want to get off the beaten track and explore rural Newfoundland.

Finding #3: A celebration of coastal communities by land and sea represents an opportunity for targeted marine and land-based visitor experiences to be aligned and marketed.

Finding #4: The Central region has tourism products that offer targeted year-round visitor opportunities.

Finding #5: Significant infrastructure investments in the Central region are foundational to the long-term growth, competitive appeal, and visitor experience.

Finding #6: There is an opportunity to raise the bar on the culinary experience through specific menu adaptations.

Finding #7: Trails are an integral part of the Central region visitor experience; identifying solutions to generate revenue and broaden the visitor experience will contribute to their long-term sustainability.

Finding #8: A more concerted effort should be made to create group and independent travel packages to sell through the various distribution channels.

Finding #9: Learning from the Shorefast Foundation's Community Host Program and embracing the principles of practice in other communities represents an opportunity to build on a successful business model in the region.

Finding #10: Communities and tourism stakeholders need to ensure responsive visitor services exist throughout the region.

Finding #11: The number of existing unique galleries could raise the bar on the visitor experience by adding a program dimension to their current retail offer.

Finding #12: Tourism businesses and municipalities are not fully optimizing their online presence; targeted training represents an opportunity for increased visitation and revenue.

Finding #13: Select outfitting lodges could attract new business by diversifying beyond their traditional product offer and target markets.

Finding #14: Collective efforts in addressing the emerging opportunities and challenges with the Tourism Assurance Plan (TAP) should be a short-term priority.

Finding #15: TDMS and e-dining databases have limitations, which are being addressed; continued effort will benefit visitors, operators, and the province and contribute to achieving the goals outlined in *Vision 2020.*

Finding #16: Amend five *Vision 2020* goals to optimize the investment focus needed to achieve the desired outcomes.

FINDING #1: LONG-TERM STRATEGIC, SUSTAINABLE GROWTH IN THE CENTRAL REGION REQUIRES STRENGTHENING INTER-COMMUNITY COLLABORATION, ENHANCING CUSTOMER SERVICE, AND DEVELOPING NEW PRODUCTS AND EXPERIENCES THAT ARE ALIGNED WITH THE NEWFOUNDLAND AND LABRADOR BRAND.

A key tourism development challenge that emerged through the consultation process was the struggle between communities to collaborate rather than compete for visitors. The reality is that visitors require a range of things to do and places to go, dine, and sleep when they are travelling in rural NL. Individually, few businesses have the potential to be a primary demand generator in attracting provincial, national and international visitation. Rather, it is the collective appeal of the destination, region, or sub-region that will inspire visitors to either fly into Gander to begin their journey, or venture north or south off Highway #1 en route between St. John's and Gros Morne, two provincial icons that attract non-resident. One stakeholder described the challenge, as "Collaboration between communities is not in our DNA, for as small towns and businesses our survival has been focused inward on our own family, business and community." From the travellers lens however, the more you can promote themes and cross promote a range of reasons to come, visit, and stay the better. The greater the appeal of the broader destination, the more attractive the destination becomes by offering a wider range of travel motivations. The ACN Regional Board has however identified that current government structures and 'boxes' could hinder or make it difficult to work together, so success will require inter-community and inter-governmental collaboration.

Opportunities/Recommendations

1. **BTCRD, HNL & ACN:** All the Central region's projects in the pipeline[7] would benefit from the Opportunity Management (OM) process in considering their merit relative to demonstrating their contribution to increasing inter-community collaboration, enhancing customer service standards, and generating new revenue with market-ready visitor experiences that can be sold direct to the market, and packaged where appropriate.
2. **HNL & Operators:** Ensuring access to, and engagement in, customer service training is an important ongoing investment to ensure the visitor expectations are met as guests travel throughout Central NL.
3. **Festivals, ACN and Municipalities:** Festivals and events are plentiful throughout the region, particularly in the summer season. It is important to look at what events are market-ready and develop additional travel generators that have the greatest opportunity to grow tourism. A regional events calendar would help inform businesses and communities about dates so festivals and events do not overlap and compete for attendance on the same day or weekend, thus diminishing the return of two or more events. Themes can be replicated between communities (e.g. music, culinary, ATV and snowmobile rides), but it is important to not duplicate, rather offer something complementary that will appeal to the same audience for another weekend, either drawing them twice to the region, or offering choice.
4. **Miawpukek First Nations, BTCRD, & ACN**: The development of an on-going array of unique market ready visitor experiences at Conne River will establish this community as an enticing attraction for travel south off Highway #1. Identifying a themed touring route that begins in Conne River, partners with communities that have accommodations, and moves through the neighboring coastal communities is the backdrop to the story and history of the area and when told, provides the opportunity to expand the invitation for more businesses to become involved. The project in the pipeline for a Tourism Development Strategy should consider the broader community context, from a visitors' lens, as foundational.
5. **GMIST & ACOA:** Consider a Best Practice Mission with Great Spirit Circle Trail, Manitoulin Island, Ontario, to support first nations tourism development so participants have opportunity to

[7] Nine Projects in the Pipeline were identified for the Central region. A description of each project is located in Table 3, Chapter 4, page 41.

learn from a successful, rural community how to build success for their people, in partnership with others in and around the community.

6. **Operators:** Operators are encouraged to take advantage of the provincial Market Readiness Subsidy Program and to participate in programs offered by the Gros Morne Institute for Sustainable Tourism, the Bonavista Institute of Cultural Tourism, Best Practice Missions and other initiatives approved by BTCRD.[8]
7. **Municipalities:** The role of municipalities in collaborating on destination branding, controlling development on a local level, and managing any tax and/or tourism levies is critical. As issues arise, communicating with colleagues and BTCRD about opportunities and challenges is critical.

This recommendation supports goals 4.1, 6.3 and 7.2 of *Vision 2020*.

FINDING #2: BED AND BREAKFASTS, COTTAGES AND INNS OFFER HIGH QUALITY ACCOMMODATIONS WITH HOSTS PROVIDING AUTHENTIC, EMOTIONAL CONNECTIONS TO VISITORS WHO WANT TO GET OFF THE BEATEN TRACK AND EXPLORE RURAL NEWFOUNDLAND.

The Newfoundland and Labrador brand promise celebrates the unique characters, stories, and special people that can be found throughout the province in the smallest of communities. The 2015 marketing campaign shines a light on the colorful stories told by individuals in smaller communities serving to strengthen this perception and the promise of connecting with locals in meaningful ways while travelling throughout NL.

Average daily rate (ADR) is the lowest for hotels at $109.08. Cottages and cabins fair better at $142.61 with B&B's and Inns securing the highest rates at $165.85.[9]

The 64 Bed and Breakfast operators (B&B's) are a critical element of the roofed accommodation sector in the Central region providing 36% of the accommodation choice and 17% of the total room capacity. When the 74-cottages/vacation homes and seven inns are included, they represent 81% of the accommodation choice and 44% of the available room inventory, which is substantial.[10]

Relative to visitors' preference for different star-rated accommodations, the Fogo Island Inn is the only 5.0-star property in the region. Of the 146 rated fixed roof accommodations, 118 (81%) are B&B's, cottages and inns, of these 85 (72%) are rated as 3.5, 4.0 and 4.5 star properties. In comparison, only four out of 33 (12%) hotels carry a 3.5-star rating, one a 4.0-star rating, and none at the 4.5-star rate, yet a minimum of 3.5-star is the quality level preferred by group and fully independent travellers (FIT) and travel trade clients.[11]

Opportunities/Recommendations

- 1. **BTCRD:** Consider leveraging the 2015 local provincial stories being aired on TV and YouTube, with additional vignettes for 2016 or 2017 that share stories from visitors who enjoy getting off the beaten track and stay at inns, B&Bs and cottages. It would be an opportunity to showcase the personalization and authentic connections between the B&B/Cottage/Inn hosts and visitors in the provincial videos.
- **B&Bs and BTCRD:** B&B's are ideal information sources for travellers. In essence, they promote what there is to do in the area. As new and innovative ways to provide visitor servicing is being addressed across the country, this presents an opportunity for collaboration between operators and the province to support the guest experience.

---

[8] http://www.btcrd.gov.nl.ca/tourism/tourism_development/market_subsidy.html

[9] Government of Newfoundland and Labrador (2015, May). *Central region performance indicators as of 11 May 2015.* Document provided by the NL Department of Business, Tourism, Culture and Rural Development.

[10] Table 23 of the V1 Ch. 1, 2, 4 sent to team (To be updated when report merged with Ch. 4)
[11] Table 25 of the V1 Ch. 1, 2, 4 sent to team To be updated when report merged with Ch. 4)

- **B&Bs, BTCRD and ACN** Given the vast size of the Central region, select accommodators may wish to explore the role of becoming experience providers as an auxiliary revenue stream. By packaging, retailing and promoting online the opportunities for guests to engage with local area activities, both the guest and the accommodator benefit. The success of PEI operators Experience PEI and Tranquility Cove Adventures are Canadian Signature Experiences and good examples of excellence. Closer to home the Fogo Island Inn has embraced the experiential travel approach as well. Each company provides a different approach to how this can be achieved.
- **BTCRD and HNL:** Assist B&B's, cottages and inns further understand yield management principles, learn techniques to charge for value, and use their differentiated assets to attract customers who are willing to pay a higher rate for higher quality accommodations and themed experiences.
-

This recommendation supports goals 6.1 of *Vision 2020*.

FINDING #3: A CELEBRATION OF COASTAL COMMUNITIES BY LAND AND SEA REPRESENTS AN OPPORTUNITY FOR TARGETED MARINE AND LAND-BASED VISITOR EXPERIENCES TO BE ALIGNED AND MARKETED.

Historically, fisherman and merchants used the coastal waterways in the north and south to access the Central region of Newfoundland for fish, wood, and minerals. With time, many settled on the various islands and in coastal areas to create communities that still exist today. "The rich heritage of this water-based highway combined with the more recent road access, presents a draw for visitors to explore these quaint coastal communities by land and sea" (Figure 4).

Figure 4: Coastal Community Visitor Access

Recreational boating and land-based travel appeal to different travellers, and they have different requirements in terms of supporting their transportation needs (e.g. parking lots vs. a slip at a marina, restaurants vs. easy access to grocery stores, etc.) Where there is alignment however, is with all parties interested in enjoying the communities they visit. If there is no invitation, experiential product that provides the opportunity to engage, boaters and land-based travellers may skip the community all together, or just stop in for basic supplies and move on.

Coastal communities have the opportunity to strengthen the visitor experience for both groups, as well as increase visitation at existing festivals, events, attractions, activities, gathering areas and amenities if there are coordinated invitations for visitors to be in the community when there are things to see and do. Enhancing the reasons to visit and promoting the social experience represents a refreshed approach to marketing to guests who are interested in meeting others, sharing experiences, and taking advantage of what the coastal communities have to offer.

To determine the viability of such an approach it would be important to begin in the communities with the greatest capacity: Lewisporte, Twillingate, Hermitage, Harbour Breton, Seldom Come By (Fogo Island), Springdale, and a unique capacity at 'By the Sea' in Kings Point. Each of these communities has a high concentration of visitor activities that are accessible by road and are within walking distance of docking facilities.

Opportunities/Recommendations

1. **ACN**, **Municipal Tourism Representatives and Recreational Boating Venues:** Examine the asset base of visitor activities and amenities, plus the scheduling of community events (boat races, ATV / snowmobile events) to determine if there is the potential to coordinate and market an invitation to communities that lure visitors at different times of the summer season, and for different reasons. This will create a 'reason' to travel the coastal highways and draw visitors into communities at key times based on existing product and identify gaps and opportunities for new experiential product development aligned with the provincial brand.
2. **BTCRD:** Conduct research into the travel patterns and spending habits of travelers within the recreational boating community, snowmobile, ATV, motorcycle, RV/Campers to understand the value these various groups bring and help determine where the focus for experience development for these land and sea touring markets and any unique infrastructure requirements.
3. **Operators & Municipalities:** Examine physical assets to determine if by adding or featuring certain travel amenities, such as laundry service, washrooms, picnic areas, transportation and visitor information, as well as potential new development opportunities, visitors travelling by land and sea may be more compelled to visit and stay.

This recommendation supports goals 2.2, 3.1, 4.1, 4.2 and 7.1 of *Vision 2020*.

FINDING #4: THE CENTRAL REGION HAS TOURISM PRODUCTS THAT OFFER TARGETED YEAR-ROUND VISITOR OPPORTUNITIES.

A surprising discovery revealed many businesses within the Central region, beyond the expected hotels and restaurants are open year-round, albeit their hours of operation may vary with the seasons. These include:

- 29 of the B&Bs (45%), 37 of the cottage/vacation houses (50%), and six of the inns; (86%);
- 93 of the trails (70%);
- 22 of the visitor retail stores (56%);
- 21 of the cultural/heritage assets (24%);
- 9 of the outfitters (11%);
- 7 of the man-made assets (33%); and
- 6 of the activity based assets (23%).

This finding, when shared with stakeholders during the validation sessions, prompted a question regarding the location of the year-round businesses and the types of assets they represent. The interest was related to opportunities for new marketing, packaging and partnering to attract incremental business. A deeper analysis that excluded accommodations, revealed 29% of these assets are in Gander and Grand Falls-Windsor, the remaining 71% are found throughout the region.

Opportunities/Recommendations

1. **ACN, BTCRD & Operators:** Potential exists to mine the database (created for the TDVAA) and sort by community, or journey route to partner opportunities that could lead to the creation of new visitor experiences and/or packages with businesses that are open year-round. With this knowledge, work with operators and BTCRD to promote the off-season potential of the Central region. Important to this process would be the ability to search by date by the visitor.
2. **ACN:** Continue to market and promote existing winter tourism opportunities while simultaneously developing new products and experiences. This focus is shared by the Western and Labrador regions as a means of meeting the needs of visitors who enjoy winter activities. Lead with existing, successful activities such as the Mid-Winter Bivver, Quad-A-Palooza and the Peninsula Shiver Soiree snowmobile event and use the TDVAA template to sub-set out the cluster of businesses open year-round, or with extended seasons, and examine their commonalities, location, and potential for new experience development.

3. **ACN & Operators:** Continue advancing the development of existing winter tourism products and experiences with industry that builds on the efforts to date to develop winter guided experiences, infrastructure, festivals and events. As new opportunities emerge, discussions with BTCRD should occur early on to determine alignment with the provincial direction at the time, as well as possible funding support for development.
4. **Operators:** Enhance their visitor communications about hours of operation, avoiding the word 'closed' if in fact they are available 'on demand', and create a network of those open year-round so they may cross-promote and advise guests about the opportunities.

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

FINDING #5: SIGNIFICANT INFRASTRUCTURE INVESTMENTS IN THE CENTRAL REGION ARE FOUNDATIONAL TO THE LONG-TERM GROWTH, COMPETITIVE APPEAL, AND VISITOR EXPERIENCE.

The Central region has experienced a number of important infrastructure enhancements in recent years including the award winning Fogo Island Inn, 20 new accommodations in the past few years, and more investments on the horizon including the Gander International Airport's enhancement plans, and explorations into more transportation options. Each investment is different in scale and scope, but each will be important to the future growth of tourism in the Central region in providing improved infrastructure and services that can increase the appeal for visitors thinking about planning a vacation to the region.

Fogo Island Inn. Photo: hospitalitynet.org/news/4060690.html

The Gander International Airport has been an iconic tourism asset for years. Once commonly referred to as the "Crossroads of the World," this airport was the largest airport in the world in the early 1940s, serving as the perfect refueling stop for transatlantic flights. Six decades later the airport provides convenient access to the Central region for visitors and the local population as well as various military personnel. It also offers a safe haven for passengers and aircraft alike during times of crises, like the 9-11 terrorism strike. The unique international arrivals area, with its 1950's interior design style, is a throwback to yesteryear in an airport that boasts a growth rate of 6.5%[12]. A $40M new airport terminal investment is planned to modernize access into the Central region for the next generation of travellers, providing a potential opportunity to develop the international arrivals area as a valuable piece of heritage architecture and design.

In a rural region as expansive as Central NL it is rare to find a single hotel property – The Fogo Island Inn – that has quite literally put the region on the map and into the consciousness of visitors from around the world. Beyond its commanding architectural presence, high-end service and commitment to the local island economy, the Fogo Island Inn attracts a new type of visitor, and interest from the travel trade and media.

As the region's only 5.0-star accommodation property that commands a price well above any other property in the province, it also demonstrates that visitors of all types, with the ability to pay, are willing to travel to the region and enjoy an authentic NL experience.

[12] Gander International Airport. (2014, Oct 9). *Passenger performance grows at Gander.* AQ press release retrieved from: ganderairport.com/article/passenger-performance-grows-at-gander/

But this is not the only new property. Responding to the changing expectations of visitors who demand higher-end accommodation, the Central region saw 16 new properties come on-stream in 2015 specifically with more planned for the coming years.[13] The majority of these are 3.0 to 4.0-star properties.

In terms of other visitor infrastructure, the study revealed a range of transportation concerns. These include: the lack of limousine service at the Gander Airport, the inability for travel trade to reserve a place on the ferry in order to access Fogo Island, unpleasant or no public washroom facilities at ferry terminals, as well as limited signage for the various ferry terminals in the region.

Opportunities/Recommendations

- 1. **Shorefast Foundation, ACN & Operators**: Position Fogo Island as an anchor to drive visitors from Gander, Deer Lake and St. Johns. Present a selection of themed independent travel itineraries that will appeal to non-resident travelers to wind their way to Twillingate, then Fogo Island profiling the architecture and fishing history of the coastal communities of Central NL. The critical link here will be quality and customer service alignment on proposed routes and for the activities and experiences identified.
- **Department of Transportation and Works:** Improve the Fogo Island access ferry terminal washroom facilities in Farewell and Stag Harbour as well as washroom facilities at other ferry terminal locations throughout the region as required for locals and visitors alike. As well, improve the visitor experience through increased signage to communicate fees, where/how to pay, where to park, where to line up to load, washroom locations, etc. As industry moves to raise the bar on Tourism Assurance Plan (TAP) approval, the government also has the opportunity to look at basic service levels for important elements such as washrooms that benefit NL and visitors alike.
- **ACN, Operators, BTCRD:** Given increased air access to Gander International Airport, everyone with an interest in growing tourism in the Central region should make a concerted effort to ensure visitors are aware of the opportunities associated with using the Gander Airport as a gateway to Central NL. Given the proximity of the Baie Verte – Green Bay part of the region, encouraging guests to arrive in Gander and depart in Deer Lake (or vice versa) could serve the broader region well.
- **Operators, BTCRD & ACN:** As more 3.5 to 4.5-star properties come on stream, ensure they are well marketed to the general public and the travel trade as new options for those seeking higher-end accommodations.
- **BTCRD, ACN, HNL & Operators:** Support the airport enhancement plans by participating in meetings, advocating for growth, identifying funding opportunities and supporting the planning phase with current research that enhances the Airport's ability to secure the funding needed.
- **Operators:** A potential business opportunity exists for a limousine company that services Gander and the three private airstrips in the region. This was identified as a future opportunity in which to invest. Additionally, a water taxi between Twillingate and Fogo Island would increase visitor flow between these two popular destinations and decrease ferry congestion – it would, however, need to be tied to ground transportation.

This recommendation supports goals 2.1, 2.2, 4.2, 6.1, and 6.2 of *Vision 2020*.

[13] BTCRD Email confirmation 10 Nov 2015: Muggee's Place, Shoreline Bed and Breakfast, Applewood Inn, Auk Island Winery Suite, Dove's Nest, Skipper's Tom Vacation Home, Whistlers View Vacation Home, The Pink House. Cabin by the Canal, Tickle View Inn, The Old Salt Box Co. - Musgrave Harbour, The Old Salt Box Co. – Greenspond, Kittiwake House, Town of King's Point RV Park, Crescent Lake RV Park and Lumsden North Park

FINDING #6: THERE IS AN OPPORTUNITY TO RAISE THE BAR ON THE CULINARY EXPERIENCE THROUGH SPECIFIC MENU ADAPTATIONS.

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

When dining out, enjoying quality food and service is important to travellers and locals alike. And while the demand for enhanced dining options continues to flourish right across the country, the viability of a more enriched culinary experience must be balanced with the dining establishment's ability to access affordable food products year-round and meet the needs of their main customer – the local community. Currently 80% (150 of the 187) food and beverage establishments in the Central region offer only casual dining, 50 identify themselves as fast food (27%), 23 are coffee shops (12%) and fine dining represents only 2% of the visitors dining options.[14]

Opportunities/Recommendations

- **HNL, Restaurant Association of Newfoundland and Labrador (RANL), Bonavista Institute for Cultural Tourism (BICT) & ACN:** Collaborate to offer specialized training, with online and face-to-face options, focused on teaching ways to adapt menus that appeal to a wider range of customers. As very few establishments listed in RANL's e-dining database identified that they were offering heart healthy foods (12%), local foods (19%), gluten free (9%), local beverages (31%) and senior's menus (2%), these represent possibilities for menu enhancements. Increasing the "Healthy or Local Dining Options" that complement the appetizers, mains and dessert sections currently offered would be desirable. ACN could support RANL to identify and invite businesses with the highest potential to engage to launch the initiative, plus play a role in ensuring marketing of this expanded choice to travellers in 2016.
- **HNL, RANL, and BICT:** Encourage food and beverage providers to invest in service training as well as evaluating the quality of the offering. As guests travel through a region, they will be looking for quality and consistency and businesses that choose to focus on raising the bar in these two areas will be able to differentiate their establishment and product offer.
- **ACN, BTCRD & HNL & RANL:** Implement best practice sessions, culinary retreats within the region and mentoring programs with Red Seal chefs in order to help restaurateurs identify ways to add select new menu items that would diversify their current menu (if even on a seasonal basis) and provide new appeal to visitors and locals alike. Best practices can be found through organizations such the Ontario Culinary Tourism Alliance www.ontarioculinary.com who have been working on raising the bar with businesses in that province. Seaview Cottage and Restaurant in Forteau is an excellent example of a restaurant with NL that has adapted their menu to promote local favorites to suit travellers tastes.

---

14 Note: An owner identifying their type of food and beverage establishment may check off more than one category for type of business and types of food sold.

- **ACN, Operators and BTCRD:** Explore the possibility of increasing the online presence of businesses that offer a unique culinary experience so this becomes a driving factor in destination choice. The variety of farmers markets, organic farms, and lobster pools, combined with the unique berry winery in the area and the four restaurants offering fine dining represent a starting point that could grow with time as more businesses diversify their menu selections. Having a TripAdvisor presence is an obvious place to begin.

Photo: Auk Island Winery in Twillingate
Source: flicker.com/photos/newfoundlandlabradortourism

- **BTCRD & RANL**: As discussions continue regarding BTCRD adding restaurants into TDMS for the future, ensure that the range and definitions of variables incorporates all options important to travellers. Plus, when the system is launched, stress the importance of accurately declaring what the business offers. For example, 45% of Central restaurants claim to offer vegetarian menu options, which stakeholder believe is overstated and not the case. Simply offering a salad does not represent a reasonable food option for a vegan or vegetarian.
- **RANL:** Explore ways to celebrate and recognize rural food achievements in expanding the visitor connection to local NL food and unique food experiences. Awards or recognition could raise the profile of change agents and stimulate others to follow.

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

FINDING #7: TRAILS ARE AN INTEGRAL PART OF THE CENTRAL REGION VISITOR EXPERIENCE; IDENTIFYING SOLUTIONS TO GENERATE REVENUE AND BROADEN THE VISITOR EXPERIENCE WILL CONTRIBUTE TO THEIR LONG-TERM SUSTAINABILITY.

Opportunities exist to expand the trails and trail networks, but these initiatives should be led by community champions who will benefit from the economic spin-offs derived from attracting more visitors to the trails. Stakeholder sessions raised concerns that there are no fees or tariffs for trail use and ACN suggested the need to explore broader funding strategies at the community level.

The large variety of trails found in the region is significant, ranging from phenomenal coastal walks that provide access to iceberg and wildlife viewing, recreational routes through the wilderness, mountains, and communities, and scenic pathways that have been used by animals and prehistoric cultures for thousands of years. Expanding the network of trails, with consistent information and signage, is important for the Central region to attract more non-resident visitors. The majority of the funding the region is seeking is for trail enhancements to connect trails, allow for safer access and provide quality visitor information about how to enjoy the trails through maps, signs, text/images and online tools. The four networks identified for initial development are the: Twillingate Trail Network, Fogo Island Trail Network, Eastport Trail Network, and the Central section of the NL T'Railway Route of the Trans Canada Trail Network.

BTCRD's trail specialists and trail advocates at the community level have long recognized the need for fees and community involvement and there is a collective desire to better leverage the provincial trail assets given they can be a real draw for visitors to an area. They are spearheading a cluster-based approach for trail developments where efforts are being made to expand trails in partnership with and through the support of local businesses. This should be encouraged throughout the region.

Opportunities / Recommendations:

1. **BTCRD, ACOA, Parks Canada (PC), Municipalities, ACN and Operators:** Embrace and adopt BTCRD's cluster-based approach for trail development in the Central 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 trail investments go beyond infrastructure and creating a trail is important. There is an opportunity to identify if trails are for single vs. multiple-use, have the potential to add fees for use and programmatic visitor activities, as well as, plan for long-term trail maintenance and promotional appeal in generating awareness for the community/sub-region;
    c. Educating proponents invested in trails and trail development about connecting the trail to accommodators, food and beverage (F&B) establishments and retailers to provide an holistic invitation for the visitor to come to the community, hike and stay;
    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.
2. **BTCRD, ACOA, Municipalities, ACN and Operators:** Prioritize funding for trail networks and specific enhancements for those projects that consider the visitor journey and link several communities and trails together with other anchor attractions (e.g. historic sites) to create holistic appeal that encourages overnight stays and participation in other community tourism offerings.
3. **BTCRD, Operators and ACN:** Explore how fees may be introduced, based on set criteria, to increase a user-pay system to support the sustainability of the trail network. This has provincial implications but does begin to address the long-term sustainability and maintenance of this vital community and tourism asset.
4. **Municipalities, BTCRD, ACN and Operators:** Identify which trails, if the experience was enhanced, would drive increased resident and non-resident visitation to a community and area. Consider strongly what could be done to enhance the infrastructure and experience along the trail and between communities to increase the length of stay, reasons to revisit, and generate direct revenues for operators and/or indirect revenues for communities.

This recommendation supports goals 4.2 and 4.3 of *Vision 2020*.

FINDING #8: A MORE CONCERTED EFFORT SHOULD BE MADE TO CREATE GROUP AND INDEPENDENT TRAVEL PACKAGES TO SELL THROUGH THE VARIOUS DISTRIBUTION CHANNELS.

Part of the charm of visiting the Central region for some guests is getting off the beaten track and enjoying the uncertainty and self-discovery aspects of travelling without a fixed agenda. Other visitors, such as FIT and group travellers find value in purchasing pre-arranged travel packages and represents as a growth opportunity for businesses through the travel trade as well as a direct-to-market sales opportunity. Although there are nine receptive tour operators that offer services in the Central region with interest in selling into the Canadian, USA and international markets, there is room to expand.

Opportunities/Recommendations

1. **ACN, Tour Operators and BTCRD:** Adventure Central in collaboration with BTCRD could take a proactive role in meeting with key FIT and group tour operators to pinpoint where the greatest packaging potential is, then work with select businesses to develop new itineraries in a variety of smaller rural communities. There is a joint opportunity here for a win-win outcome by helping operators reach new markets by working with tour operators who are looking for new packages, and together ensure the product offer is described and promoted well to visitors. In addition, these packages could contribute a new revenue stream and increase a company's exposure when posted to the provincial website.
2. **HNL:** Consideration should be made engaging a highly experienced team of FIT and group travel trade tour operators to deliver small group seminars to businesses who are not engaged in packaged travel or who have not reached their full potential working with this market to better understand the basic opportunities, principles, yield management, understand the differences between receptive tour operators and their customers, and marketing opportunities that can be realized by allocating a percentage of their business towards packaged travel.
3. **HNL:** As the packaging potential increases, capture the journey of a few different types of businesses in educational case studies (e.g. B&B, attraction, activity-based business) to be used in training, to inspire others, and celebrate success.

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

FINDING #9: LEARNING FROM THE SHOREFAST FOUNDATION'S COMMUNITY HOST PROGRAM AND EMBRACING THE PRINCIPLES OF PRACTICE IN OTHER COMMUNITIES REPRESENTS AN OPPORTUNITY TO BUILD ON A SUCCESSFUL BUSINESS MODEL IN THE REGION.

The Community Host program on Fogo Island received the 2013 Global Vision Award from Travel Plus Leisure for sharing and celebrating the island's significant cultural history and cod fishery through the joint efforts of the Shorefast Foundation and the Fogo Island Inn.[15]

This unique program involves:

> "Fogo residents act as front-of house experts, walking guides, part-time drivers and full-time storytellers … Guests seem to fall prey to the islanders' storied charm, and then to something deeper: a sense that the people and the place and their purpose are all aligned."[16]

Building on the principals of community engagement, investment, and tourism development, this model represents an approach that other communities could follow. It represents a creative way to collaborate and connect visitors to authentic, memorable experiences articulated by a local. As this program has

---

[15] The Telegram. (2013, Oct 16). *Fogo Island Inn wins travel award.* Downloaded from: http://www.thetelegram.com/Business/2013-10-16/article-3429497/Fogo-Island-Inn-wins-travel-award/1

[16] Ramsey, B. (2014, June). *Fogo futures.* A Canadian Geographic magazine article retrieved from: https://ramsaytalks.com/wp-content/uploads/2014/06/Fogo_Jun14-LR.pdf

received awards and notoriety the term ‘community host’ program should only be considered for use if the quality of excellence and all principles of engagement and sustainability are in place. If not, an alternative name that is a derivative and aligned with the businesses/investors should be considered. The model holds promise for communities that want to grow the opportunities for storytellers and interpretative guides to benefit financially from sharing their time, experience and community on a personal level with guests.

Opportunities/Recommendations

- **1. BTCRD & Shorefast Foundation:** Collaborate on creating a case study that provides the history, benefits to visitors, business and communities, and explains the business model for operating the Community Host program. Provide insights and suggestions for other communities to introduce this program in the future. By organizing community hosts through a single organization allows for one business to meet the TAP criteria. Businesses wanting to ensure a personalized, authentic, memorable experience for their guests can arrange this through one organization that also serves as the point of sale for all community hosts.
- **HNL & Shorefast Foundation:** Once the case study is complete, HNL could host a webinar with Shorefast to share the case study with interested municipalities in NL and Canada, thereby increasing the notoriety of the region and NL as a tourism destination known for innovation and effectively creating authentic connections with the locals through personalized visitation opportunities.

This recommendation supports goals 1.3, 3.1, 4.1 and 7.1 of *Vision 2020*.

FINDING #10: COMMUNITIES AND TOURISM STAKEHOLDERS NEED TO ENSURE RESPONSIVE VISITOR SERVICES EXIST THROUGHOUT THE REGION.

Industry stakeholders raised the importance of visitor servicing. In 2015 the Central region lost the Visitor Information Center (VIC) in Exploits Valley and will lose the Newville (Twillingate) VIC in 2016. Industry stakeholders confirmed a need to meet the informational needs for guests wanting to get off the beaten track, connect with locals and discover the hidden charm and treasures within the smaller communities in the Central region. However, the shift to mobile technologies as a major planning tool before and during travel means that visitor servicing must evolve to align with where travelers are seeking information. A VIC in every community is costly, and not necessary. However, there is a vital role for the face-to-face connection, particularly when visitors get off the beaten track and want ‘locals know’ information that goes beyond what is published on the provincial website.

Fogo Island’s new investment in a VIC is part of the solution, however, Central is a vast region and visitor information needs to be readily available, appreciating that online accessibility varies in parts of the region.

Opportunities/Recommendations

1. **BTCRD, ACN & Municipalities:** Engage municipalities and other organizations, such as Chambers of Commerce, in discussions about the future roles and responsibilities and financial support that can be leveraged to develop a visitor servicing strategy that meets the needs of future travellers, is affordable, responds beyond traditional 9:00 – 5:00 business hours, and is staffed and maintained to optimize the visitor experience (be that face-to-face or online)
    a. Investigate the potential for online information kiosks that have access to provincial website information and also a capability for local visitor information to be dynamically uploaded, creating a shared responsibility with businesses and communities. Electronic kiosks, such as that in the Fort St. John airport in British Columbia, could be an option. The key to success is locating kiosks where visitors would typically stop in a small town and potentially having service agreements with local business locations;

- **b.** Explore other emerging technology solutions at high traffic places in small rural communities with a link to a regional on-line chat option manned on a contract basis with knowledgeable locals;
- **c.** Explore the potential for an Ambassador training program for visitor counsellors and other interested parties who can promote tourism through their business to increase overall awareness and knowledge; and
- **d.** Examine the potential for a mobile VIC that can move around the region and go to where the crowds are and where information is needed at certain times of the year, such as at special events to provide on-the-spot personalized travel counseling.

2. **BTCRD:** Actively monitor the evolutions in other provinces as they too work to create innovative visitor servicing solutions, pilot new ways of addressing the digital divide between mobile and face-to-face visitor servicing. Ideas may emerge that could form the foundation for pilots in certain communities and regions to test out creative visitor servicing.
3. **ACN, HNL & BTCRD:** Explore with the B&B members of HNL and ACN ways to support them in gathering and sharing visitor information to guests. B&B operators participating in the stakeholder sessions confirmed they are already providing this service, but most are restricted to very local area information and are not able to provide information about the visitor's full 'journey'. For example, having an industry information portal, that is dynamically updated and accessible by front-line staff/registered tourism professionals, could be an avenue to better serve visitor's information needs and also help other businesses access information that goes beyond what is currently in TDMS.
4. **BTCRD, ACN & Gander International Airport Authority:** Affirm if the type and level of service at the Gander International Airport Visitor Information Centre should expand as this gateway city looks to expand their capacity.
5. **Operators:** More businesses should be enourgaged to carry visitor information, show the provincial ads, link to existing content produced by the province or Destination Canada in promoting the region on their websites, Facebook page or other online distribution channels where they are engaging with their guests.

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

FINDING #11: THE NUMBER OF EXISTING UNIQUE GALLERIES COULD RAISE THE BAR ON THE VISITOR EXPERIENCE BY ADDING A PROGRAM DIMENSION TO THEIR CURRENT RETAIL OFFER.

A diverse and proud visual arts community exists throughout the Central region. Buoyed by the success of artists such as David Hayashida, Stan Hill, Janet Davis, and Pete Barrett to name a few, the potential to engage visitors with artisans beyond pure retailing is strong. Reported by stakeholders as an untapped opportunity, creating a base of visitor experiences that allows visitors to connect with the artisans, engage in hands-on-learning experiences, and create a personally crafted memento represents a business development and collaborative marketing opportunity.

Stakeholders reported that there is not a strong connection, at this point, between BTCRD, ACN, the Craft Council of Newfoundland and Labrador and the Newfoundland and Labrador Arts Council (Arts NL) in terms of encouraging product development, business development, and promoting the visual artists as tourism experiences. Assistance would be needed in terms of introductory workshops that highlight the possibilities, and draw on success stories, such as fabric artist Molly White and her Molly Made Fiber Art Studio in Norris Point[17], or Kristyn Watterworth and her Kryart Studio in Bayfield Ontario[18]. In Central, examples include Kings Point Pottery clay workshops, the Inn at Happy Adventure's wine and painting

[17] http://www.mollymadefibreart.com/
[18] http://www.kryart.com/#!about/c1enr

classes, Jas Silks silk dying workshops and the House of Diamonds Art Center with a range of programs targeted to visitors in Terra Nova National Park.

Opportunities/Recommendations

1. **ACN, Arts NL, Visual Arts NL (VANL), Central NL Visual Arts Society (CNVAS), Craft Council of NL and BTCRD:** Reach out to all artisans (visual artists through to crafts people) in the Central region who have the potential to engage visitors in their studios/communities to determine the level of interest in creating a suite of visual arts visitor experiences that could be delivered on a regular or special basis (e.g. conferences, FAM trips, special events). Create a short list of artists, the diversity of their product (e.g. fabric, print, photography, clay, wood), and their location as a starting point to begin mapping out where the pockets of opportunity exist currently, forming content for the development and marketing of new experiences to be in-market for 2016 or 2017.
2. **HNL & NL Craft Council:** Be prepared to develop a short introductory workshop for interested artists to help them learn about this new business opportunity and the characteristics of working as a tourism business from a programming perspective, how to partner, price and for some the potential to offer mobile workshops.
3. **ACN:** Can respond to the regional interest in having art and craft businesses registered in TDMS by working with their stakeholders to educate them about the potential this tourism affiliation has for their business.
4. **BTCRD**: Monitor the evolution of this initiative for application and relevance in other areas of the province where similar potential exists and to be prepared to provide marketing support at the appropriate time.

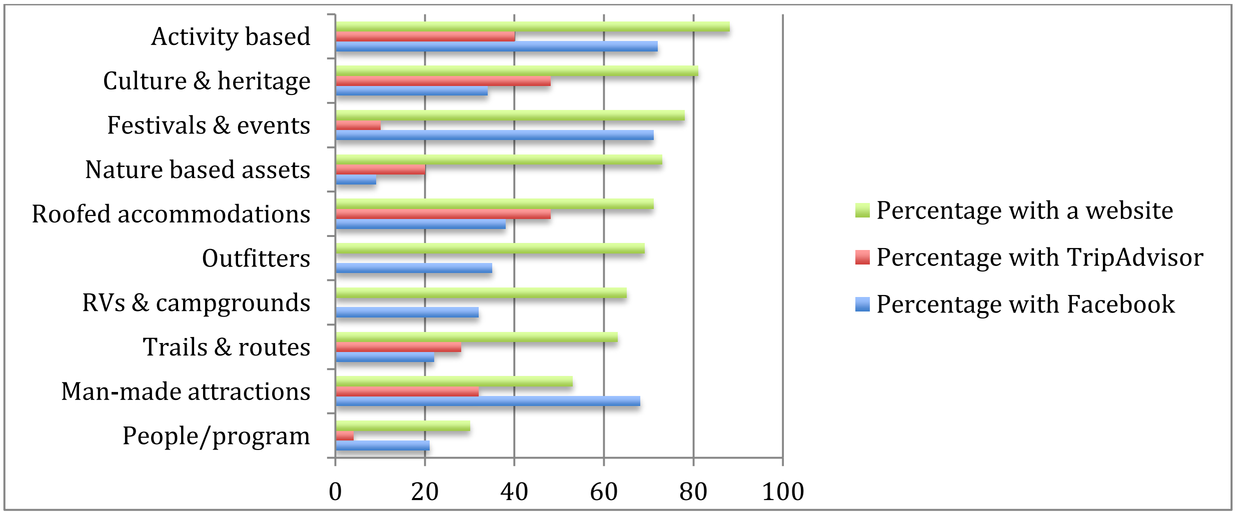
This recommendation supports goals 1.3, 4.1, 6.1 and 6.2 of *Vision 2020*.

Photo: Kings Point Pottery Credit: Trevor Lush

FINDING #12: TOURISM BUSINESSES AND MUNICIPALITIES ARE NOT FULLY OPTIMIZING THEIR ONLINE PRESENCE; TARGETED TRAINING REPRESENTS AN OPPORTUNITY FOR INCREASED VISITATION AND REVENUE.

The percent of tourism businesses with websites, a TripAdvisor presence and Facebook account varies greatly throughout the Central region with activity based businesses overall carrying the greatest web reach via these three core online channels (Figure 5).

Figure 5 Central Region Online Website, TripAdvisor and Facebook Presence



The TDVAA database provides a benchmark for ACN to monitor and support improved engagement, particularly for businesses.[19] Of particular concern is the discovery that of the 688 tourism assets reviewed, 33% did not have a website. This is an essential element of being market-ready. In this day of multi-platform digital engagement and as online engagement statistics continue to grow annually, those without this basic online storefront information run the risk of not being in the consideration set for visitors. TripAdvisor and Facebook also represent important points of contact with visitors, and here the ability for visitors to connect and engage with businesses drops even further, with only 36% of business having a Facebook account and 72% having a TripAdvisor presence. While these tools are free, they do require a commitment of human resources to engage travellers on an on-going basis. The same applies for other popular social media sites for visitors including YouTube and Instagram, which were beyond the scope of this study but may be important to individual businesses.

In reviewing municipalities, 47% have a website, which is on par with the Eastern region at 41%, but behind the Western region at 67% and Labrador at 88%. The value of having a website with a tourism landing page is important to visitors who may only know the name of a town since they can then be connected to businesses in the area that may service their needs.

[19] See Tables x, y, and z for details on the business sectors website information, TripAdvisor and Facebook.

Opportunities / Recommendations:

1. **ACN & HNL:** Extract from the TDVAA database the tourism businesses without a website, TripAdvisor page and/or Facebook account to create a list of operators that could be approached to invest in enhancing the reach of their business by using these tools. ACN could take the lead on connecting with businesses to explain the importance of this missed opportunity relative to why visitors use these sites as part of their trip planning and decision making process. HNL could develop three targeted one-day workshops that take an operator from a state of non-engagement, to understanding the relevance, how to invest, the level of effort required to maintain, the conversation protocols expected by consumers and how to use these marketing tools. For TripAdvisor and Facebook specifically, have them leave the workshop having created a presence and started opportunities for online conversation through these effective tools. The training must go beyond relevance and benefits and include 'hands-on keyboard' learning/doing. ACN can use the baseline data from the TDVAA to monitor uptake and improvements over the next two to three years.
2. **Operators**: For businesses with a website, add experience descriptions, videos and photos of visitors engaged in activities that show potential visitors the type of experience they can anticipate. Ensure a call to action for direct sales is evident, and if working with the travel trade and/or travel media or would like to attract this type of interest, ensure information and a call to action is included on specific landing pages. Investigate online reservation systems, ensuring there is "how to get here information", and for the 44% that do not accept credit card payment, explore electronic payment options from traditional credit card companies, to PayPal and Square (as a few examples) in order to offer this important visitor service.
3. **Operators, Municipalities & ACN:** Invest in high-definition images that convey emotion and the physical connection to the people, places. As new photo shoots are scheduled by the province or Destination Canada, ACN should ensure operators in the Central region are made aware of these opportunities. Where excellent regional videos or images are produced by other organizations and available online, ACN could assist operators by sending the links so they may add these to their online sites.
4. **ACN, HNL, BTCRD and ACOA:** Identify where there are gaps in internet/cell service, or where only certain providers operate (e.g. Rogers vs. Aliant). Appreciating improving access throughout the region is beyond the scope of the tourism industry, DMOs and operators can inform the visitors of what they can expect in different towns/sub-regions for connectivity, and/or places to go to gain online access such as public buildings or common spaces. Also, ensure tourism advocates are involved in the inter-government department conversations to influence Internet accessibility from the visitor's perspective and needs of tourism operators.
5. **Municipalities:** Building a 'tourism website' is not recommended, for this is not the core business of a municipality. Effort should be made however, to ensure there is a 'visit us' or 'visitors' landing page with links to the provincial tourism website and tourism businesses in the specific community.

This recommendation supports goals 5.1, 6.1 and 7.2 of *Vision 2020*.

FINDING #13: SELECT OUTFITTING LODGES COULD ATTRACT NEW BUSINESS BY DIVERSIFYING BEYOND THEIR TRADITIONAL PRODUCT OFFER AND TARGET MARKETS.

Outfitters are an important sector of Central region's tourism business. NL benefits from a widespread and positive reputation among Canadian and American anglers and hunters. Boasting 60% of all North American Atlantic Salmon rivers the Newfoundland and Labrador Outfitters Association (NLOA) identified angling as the lynch pin to growth of the outfitting sector by:

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

There is opportunity now to begin thinking about how to diversify the product and market offer with some of the outfitting lodges to attract other speciality groups, such as catch and release leisure travellers (vs. the hard core hunters or fishers), inter-generational trips to connect families to the land and shorter soft-adventure packages that could include a half day introductory session, to two or three days vs. the traditional one-week packages. And for some, depending on their proximity to the larger urban centers, they could explore the use of their venue for small group corporate meetings/retreats, snowmobiling or ATV excursions, etc.

And, it is an ideal time for HNL, NLOA and Central region outfitters to work together to cultivate a 'culture of professional certified guides' that are licensed, TAP approved (including the packaging/accommodations they may offer), and with the skills to meet the needs of evolving visitor expectations.

Opportunities / Recommendations:

1. **HNL, BTCRD, ACN, NLOA, Arts NL & Outfitters:** Meet to discuss the potential for expanding the traditional focus of the outfitting businesses and identify strategies to diversify the product offer, extend season and facility use for other tourism purposes. Appreciating only a selection of operators will want to embrace this type of business evolution, BTCRD can provide product development support to those interested. HNL/NLOA could offer specialized training for this group with the goal of having new tourism products for new markets related to hunting and fishing in market for 2016 or 2017.

2. **ACN, BTCRD, & NLOA:** Take a proactive role in helping outfitters understand how to move beyond 'listing their business on the internet' to effectively convey the experience differentiation and enhancing the call-to-action and ways to close the sale relative to today's consumer expectations. Focusing on specific measures – such as communicating where to buy a fishing license, and having staff that sell them aware of the fishing opportunities complements the online marketing efforts and adds the personalization factor once guests are in community.
3. **NLOA, BTCRD, & ACOA:** Raise the profile and value of hiring qualified guides. Introduce *"Glorify the Guide"* (example working title), an initiative designed to showcase successful guides and recruit more guides by encouraging them to get involved in providing quality service to visiting hunters and anglers to ensure they have a memorable experience.

This recommendation supports goals 4.1, 4.3, and 6.2 of *Vision 2020*.

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

FINDING #14: COLLECTIVE EFFORTS IN ADDRESSING THE EMERGING OPPORTUNITIES AND CHALLENGES WITH THE TOURISM ASSURANCE PLAN (TAP) SHOULD BE A SHORT-TERM PRIORITY.

Central NL's Destination Development Plan is the first region to introduce a finding related to the introduction of TAP as a new base level of quality assurance in the province. While overall uptake in achieving this basic standard is strong and stakeholder feedback at the validation sessions confirmed its importance, some insights about the program were revealed.

There is concern with retail, trails and camping businesses given they have the lowest levels of approval. Three issues were discussed during stakeholder validation sessions regarding TAP revealing: (1) Some businesses indicated they had not received enough or appropriate communications regarding the new standards and the marketing implications for not becoming TAP approved; (2) Some businesses were challenged with one or more of the categories, such as insurance and raised new issues about how TAP related to working with non-TAP approved musicians and artisans; and (3) There are some businesses who simply will choose not to seek approval and accept the lack of provincial marketing reach and industry membership/partnership opportunities resulting from their decision.

Opportunities/Recommendations

- **Total Quality Assurance:** Similar to the Better Business Bureau (BBB) which provides a logo for business websites and office-front windows, HNL should explore providing a similar type of identifier to recognize companies that are TAP approved and build consumer recognition around operators who meet the provincial standard.
- **ACN & HNL:** ACN should continue to track the non-approved businesses in their region and reach out to them individually to determine what is limiting their ability to become TAP approved. They should continue to document the insights to understand where the challenges exist for their operators and share with HNL. This adds to the foundation of regional insight for HNL to monitor the program with regional input. While festivals and events are already captured in TDMS, continued communications and ongoing clarity is needed for businesses hiring musicians, local experience providers, artists and other individuals who enhance the visitor experience but may not be registered and operating as a tourism business.
- **Operators:** While TAP approved businesses are able to partner with non-TAP approved businesses, as a best practice, operators should align with TAP approved businesses to build the consumer awareness of this designation and if they are partnering with a non-insured partner consider placing them on an insurance rider[20] with their company.

This recommendation supports goals 1.3 and 7.1 of *Vision 2020*.

[20] An insurance rider is a provision to an insurance policy that is purchased separately from the basic policy and provides additional benefits at additional cost. Riders help policyholders create insurance products that meet their specific needs.

FINDING #15: TDMS AND E-DINING DATABASES HAVE LIMITATIONS, WHICH ARE BEING ADDRESSED; THIS WILL BENEFIT VISITORS, OPERATORS, AND THE PROVINCE AND CONTRIBUTE TO ACHIEVING THE GOALS OUTLINED IN VISION 2020.

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

Principally designed to capture information relevant to consumers, TDMS is also a source of business-to-business insight for product partnering, packaging, and the travel media and travel trade. Operators are encouraged to raise the bar with experiences that command a higher price point - access to experience providers (program based operators/individuals) that can provide their 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 three Destination Development Plans completed to date (Eastern, Labrador & Western).

At the heart, future enhancements have the potential to explore a shift from a controlled approach, whereby the province is the only organization to monitor the quality and currency of the TDMS, to a defined, designated role by the regional DMO's who are closer to the stakeholders and can contribute to ensuring the accuracy of data provided. Ultimately, ensuring visitor access to current, real time accurate information will be an opportunity for the future.

Opportunity/Recommendations

1. **BTCRD & RANL:** Critically review the variables examined in the TDVAA, consult with restaurateurs, and the BICT to ensure the full range of variables important to visitors are captured in the new variables for this category in the database.
2. **Operators & ACN:** BTCRD and RANL are in discussions to have food and beverage operators complete a Tourism Operator Profile form to become part of the provincial tourism marketing system. ACN can be instrumental in ensuring operators are aware of the opportunity when it is introduced and ensure everyone signs up. Operators will need to complete the forms ensuring the declarations they make on the form (e.g. regarding vegetarian, vegan, gluten etc.) are honest and will reflect what a visitor can enjoy at their establishment.

This recommendation supports Goal 3.1 of *Vision 2020*.

FINDING #16: AMEND FIVE VISION 2020 GOALS TO OPTIMIZE THE INVESTMENT FOCUS NEEDED TO ACHIEVE THE DESIRED OUTCOMES.

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

Opportunity/Recommendations

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

Goal 3.1

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

Goal 4.1

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

Goal 4.2

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

Goal 4.3

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

Goal 7.2

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

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

In summary, it is important to note that there is limited capacity in the Central region to coordinate activities for very few organizations have a regional or sub-regional mandate. This reality will need to be carefully considered during the O&M process for prioritizing initiatives and ensuring the human, technical and financial resources are in place for successful implementation.

BTCRD does have funds under the Business Development Support Program that could cover 50% of the costs associated with training, package development, marketing, and securing professional expertise. Considerations at the operator and community level should be given to partner businesses sharing costs to secure the remaining 50% plus this strengthens the opportunity for likeminded businesses to collaborate to compete on visitor experience development.

4. Informing the Findings

For the type of traveller who prefers to get off the beaten path, enjoys unstructured travel, observing the natural world at its finest, discovering stories of the past, and connecting with nature and the local people, then a visit to the Central region of Newfoundland presents an opportunity to immerse in a memorable, leisure travel experience.

From historic coastal communities of the northern and southern shores, extensive aboriginal history and unique Miapukek First Nation reserve in Conne River, a diverse artisan community to tales of resettled communities, the rich history of Central Newfoundland awaits travellers from around the world.

Accessible by land, air, recreational boat and adventure cruise ships; the unique heritage of the Central region is ready for visitors to explore. Encompassing zones 11 to 14, the Gander/Twillingate East to Terra Nova (Zone 14) has the third highest total non-resident travel visitation within the province behind Zone 7 (Gros Morne Area, Viking Trail North to and including Plum Point) and the St. John's area.[21]

Photo: Iceberg boat tour near Twillingate Source: icebergquest.com

In the past few years, the international notoriety of the region has been amplified by Iceberg Alley and the opening of the Fogo Island Inn, drawing media attention and visitation to the region. Combine this with the steady increase in air capacity into Gander International Airport[22] and an industry of tourism stakeholders ready to grow, the Central region is poised for the future.

The diversity of the opportunities to enjoy in the Central region is striking. For those who enjoy the performing and visual arts, the region is home to many talented artists such as actor Gordon Pinsent, musician Kevin Blackmore of Buddywasisname and the Other Fellers, comedian Shawn Majumder and renowned potter David Hayashida. A mature outfitting industry attracts anglers from around the world to enjoy salmon fishing in the Exploits Valley and other areas around the region. The greatest challenge for travellers is figuring out how to navigate the region because of its size. Once you choose to depart the Trans Canada Highway travel distances between sites are significant, so advanced trip planning ensures there is enough time to fully enjoy all the region has to offer.

[21] Government of Newfoundland & Labrador. (2011). *2011 Exit survey. Program highlights (non-resident).* P. 7. Retrieved from: http://www.btcrd.gov.nl.ca/publications/recreation/visitor_exit_survey/2011_ves_Highlights.pdf.

[22] Inter*VISTAS.* (2014). *Gander international airport: Economic impact study.* Retrieved from: http://www.ganderairport.com/wp-content/uploads/2014/11/YQX-Economic-Impact-Study-11Sept2014-FINAL-REPORT.pdf

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, education, research, 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.[23]

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 January 2015 UNWTO report states that global international arrivals increased 4.7% in 2014, well above its long-term projection of 3.8%.[24]

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 visitors. 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[25].

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.

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%.[26]

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 were added to service China, Germany and Japan. France added nearly 20,000 seats, mostly from Air France and Air Canada.[27]

Overnight trips by Canadians to the US and other countries increased 1.5% in 2014, continuing the previous years' 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%.

[23] World Tourism Organization. (2013). *UNWTO Tourism Highlights, 2013 Edition.* (pg. 2.)

[24] Canadian Tourism Commission (2015). *Fact Sheet.* Retrieved from: http://rendezvouscanada.travel/wp-content/uploads/2015/05/Tourism_Industry_Fact_Sheet_FINAL_May_2015_EN.pdf

[25] Canadian Tourism Commission. (May 2015) Tourism as Canada's Growth Engine; 2014 Annual Report.

[26] Ibid

[27] Canadian Tourism Commission. (May 2015) Tourism Industry Fact Sheet.

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 (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).[28]

The USA remains Canada's best international market accounting for 19% of total US outbound visitation. Twelve states consistently generate more than 70% of Canada's total US overnight visitation and 67% of all US visitor spending within Canada. Only four of those states (Michigan, Minnesota, New York and Washington) are border-states, debunking the myth that most US travel is of the short-stay, low-spend variety.[29] 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[30], the number of international outbound travellers from the United States has not increased in 14 years.[31]

Globally, Canada continues to excel in brand recognition. Ranked as the #1 country for overall reputation in the world,[32] the FutureBrand's Country Brand Index also rated Canada as the #2 country brand in 2012[33], and #1 in 2010 and 2011[34] yet it is not translating into the visitation numbers industry would like.

As the federal government reduces Destination Canada's budget year-after year, other countries are investing significantly more to attract international visitors (Australia's budget $150M CAD, Britain $64M CAD, Brand USA $105M CAD). Fortunately for the industry, the federal government had provided a new $30M investment over three years for the purpose of marketing in the USA.

NEWFOUNDLAND & LABRADOR

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.[35]

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. Auto visitation and expenditures however dropped 7.3% and 5.4% respectively between 2013 and 2014, and cruise was even more significant with a 13% drop in 2014 visitation and 11.1% drop in expenditures.[36]

---

[28] IBID, p. 9

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

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

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

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

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

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

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

[36] Ibid. p. 2.

In terms of accommodations, the performance of roofed accommodation 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%.[37] Performance was mixed at the regional level, with increases in Eastern (4.7 points) and Western regions (1.5 points) leading the province and decreases on the Avalon Peninsula (-3.5 points), Labrador (-4.8 points) and a slight decrease of -0.8 points in the Central region.

Provincially, average daily room rates were up 4.4% to $133. **At 8.7%, the Central region recorded the highest increase in average daily rates from 2013 to 2014 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.[38]

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, while the number of passenger related vehicles decreased 5.7% during the same period. Although **cruise traffic** is small in the Central region, the province received approximately 26,800 unique[39] cruise visitors during the 2014 cruise season.

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. There was a reported 13% decline in camping activity in Central Newfoundland. Camping activity attributed to residents of the province decreased 5% for the 2014-operating season while camping attributed to non-residents declined 3%. At **Terra Nova National Park** camping activity increased 1.5% for the operating period ending October, 31st, 2014.[40]

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 continue industry growth and optimize investments of limited resources. This, in turn, will increase the tourism benefits to businesses and communities.

The Newfoundland and Labrador Tourism Board, a public private partnership of industry and government, is well positioned to support targeted investment in product and market development and human resource support for the tourism industry. This will be done as they continue to work towards driving the provincial strategic plan, *Uncommon Potential: A Vision for Newfoundland and Labrador Tourism (Vision 2020).*

In Newfoundland and Labrador, over $100 million has been invested in provincial marketing since 2006 and the Find Yourself Here Campaign has garnered 227 awards since 2006 and created strong brand awareness for the province.[41] Yet, attracting new visitation remains a challenge for Canada and NL alike. Countries like the USA, for example, are investing in their Brand USA campaign to lure Canadians south of the border.

[37] 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.

[38] 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.

[39] Number of 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.

[40] 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.

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

Finally, the **talent gap** continues to be a major challenge facing the tourism industry in Newfoundland and Labrador[42] and across Canada.[43] [44] 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 of operation, shortened operating seasons, sharing staff, or partial room operations for hotels. Newfoundland and Labrador is internationally renowned for its people and hospitality and will have to innovate wisely, consider new staffing business models and consider hiring mature workers 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.

Fishing on one of the many rivers in Central Newfoundland Photo: Newfoundland and Labrador

[42] 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.

[43] 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

[44] 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

4.2 Data Insights

There are five dimensions to the TDVAA (Table 1). It is important to note that the categorization is not absolute; rather it is based on a review of the data, discussion with Central Newfoundland stakeholders and the sum of conclusions reached.

Each dimension first presents the summary statement, followed by data tables, key findings about the facts, and finally, the implications and considerations. Upon review of the data, the project team determines if the region is doing very well in an area, and if so, a green indicator is given. This implies, continue to do what you are doing; there may not be a need for new investment. A yellow signifies a balance of some evidence that positive results exist, but there is targeted investment needed. A red indicator means this is a weak area and requires a specific focus. These, of course, have to be considered within the overall strategic priorities of the province and the region.

Together, the facts and figures in Chapter 4 are reviewed, along with qualitative stakeholder feedback, information from key documents, targeted interviews, and numerous team meetings to present the key findings, opportunities and recommendations that are located in Chapter 3.

Table 2: High Level Summary of the Key Assessment Dimensions

1. Reports, Plans and Studies Dimension			Yes	Almost	No
Existing Info	Existing information	EI1 Depth of reports, plans, studies	X		
	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 Tourism operators with essential info		X	
	TripAdvisor	CE3 Municipalities with TripAdvisor accounts		X	
		CE4 Tourism operators with TripAdvisor accounts			X
	Facebook	CE5 Municipalities with Facebook accounts		X	
		CE6 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	Variety of culture and heritage assets	X		
		IB4.1	Culture and heritage assets at varying price points			X
	Nature Based Assets	IB5	Variety of nature based assets	X		
		IB5.1	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 Tourism Attractions	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, Meeting Space	IB10	Offers conference, convention, and trade show space as a primary draw for markets		X	
	Activity-Based Tourism Assets & Outfitters					
		AB1	Offers a range of visitor activities	X		
		AB2	Flexibility/for length, interaction & price	X		
		AB3	Tour operators that package & sell domestically		X	
		AB4	Tour operators that package & sell internationally		X	
	People/Program Based Companies					
		PB1	Has a range of experiential program providers		X	
		PB2	Hosts a number of festivals & special events	X		
		PB3	Festivals/special events are offered on a regular basis	X		
	Demand Generators					
		DG1	Primary demand generators	X		
		DG2	Secondary demand generators	X		

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

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

4.2.1 Reports, Plans, and Studies Dimension

1. Reports, Plans and Studies Dimension: Existing information available to industry, plus projects in the pipeline at the discussion stage or submitted for approval or funding.		
Consolidate Existing Information	EI1 Existing information E12 Projects in the pipeline	Identifies the documents, plans, studies, and projects that impact tourism (secondary data).
Data Collectors	BTCRD, HNL, Adventure Central 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]

A total of 234 documents were captured in the secondary data review for the Central 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 Central region, plus examine the provincial, national and international relevance.

The following documents were reviewed:

- 9 International documents
- 56 National documents
- 100 Provincial documents
- 42 Central Community/Business/Regional documents
- 27 Projects in the Pipeline related documents

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);
- Central 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 the 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 (2010 - 2014). Table 3 lists a sample of projects identified as offering future tourism potential for Central Newfoundland. The full listing of Projects in the Pipeline are located in Appendix 2.

Table 3 A Sample of Projects in the Pipeline Offering Tourism Potential

Projects	**Brief Description**
Miawpukek First Nation Tourism Development Strategy, Discovery Centre	A market driven tourism strategy with cultural preservation and the need to work towards financial viability. A plan for the long-term development of the Centre. It proposes clearly defined roles for the Centre, a potential discovery and interpretative plan, a retail strategy, and a framework for communications, marketing and promotions.
North Atlantic Aviation Museum Ferry Command Memorial Hall	A proposal describing the intention to build a hanger to house, preserve and display a rare “bomber” plane.
Gander International Airport New Terminal & Adaptive Reuse Plan	A plan to build a new terminal building. The construction of the new air terminal building will cost $40 million.
Change Islands Newfoundland Pony Refuge	Develop the Pony Refuge pasture. Plan includes capital requirements, management, objectives, company description, operations, products and service, market analysis, marketing strategy, and financial forecasts.
Rita Love Memorial Kitchen	Infrastructure done, programming and experience development required.
Gander Strategic Plan	Hiking trail enhancement and tourism packaging
Boyd’s Cove Beothuk Interpretation Centre	An initiative to update and renew the interpretive visitor experience and facilities including opportunities a refresh and expansion of the current visitor experiences.
Red Indian Lake	Ideas for adventure tourism (i.e. hiking trail, fish derby, wildlife sites, interpretive maps, establishing an archaeology committee, repairing bridges).
Eastport Peninsula Heritage Society	A framework to help maintain sustainable practices in the region and the society’s work so they may to continue to deliver visitor programming.

Note 1: A proposal to stage a Digital Arts Festival in Twillingate New World Island in 2015 was identified as a project in the pipeline. By the time of completing this report, it has come to fruition The Unscripted Digital Arts Festival was held in September 21-26th 2015 It had over 40 volunteers and a total of 600 attendees. This festival was supported by BTCRD and ACN http://www.unscriptedfestival.com/

Note 2: A second project in the pipeline – a Cross country ski, mountain bike park and in the Grand Falls-Windsor area was identified and the proposal is currently being reviewed and work on the bike trail has begun according to BTCRD.

Key Findings

- There is a wide range of documents informing the tourism context for the region, the majority being at the provincial level and of general relevance to all regions;
- While the Central region has fewer reports, plans and studies than other regions to date, those provided demonstrate a range of tourism activities are in play throughout the region;
- The most regionally significant project in the pipeline is the Gander International Airport adaptive reuse and new terminal plan. Smaller initiatives will contribute to diversifying the visitor experience through festivals, community programming and expanded infrastructure if they come to fruition;
- Research has been conducted regarding recreation boating and its potential for the area;
- There was little reference to tourism in the municipal documents/community strategic plans received; and
- There was little provided on sustainability, labour environment, infrastructure, and outfitting.

Implications/Considerations

- The TDVAA Advisory Committee, BTCRD, ACOA, ACN and HNL should examine the details of the projects in the pipeline on an annual basis to ensure investment is directed to the core projects in the pipeline that will provide the greatest return on emotion (ROE) for visitors and return on investment (ROI) for operators.

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, Adventure Central
Customer Online Engagement	CE1/CE2 Websites CE3/CE4 TripAdvisor CE5/CE6 Facebook	Assesses if the destination, cities and businesses have a website, TripAdvisor and/or Facebook account and the degree of responsiveness to traveller posts.	Data Collectors: Data collection team

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]

CUSTOMER RESEARCH

The province gathers a wide range of ***demographic information*** on a number of variables such as visitation, roofed accommodations, camping, airport passenger movement, room night sales, non-resident demographics, per-party spend, etc. This information leads from a provincial perspective, and where the sample size is sufficient, a regional segmentation to be extrapolated.

There is limited ***psychographic information,*** specifically on visitors to the central region, to help create a visitor profile for their operators. A research presentation of the Canadian Travel Market based on a new Non-resident Travel Attitudes and Motivations study was conducted by BTCRD (Nov 2013). Findings from the Non-resident Travel Attitudes and Motivations study helps fill part of the psychographic informational gap.

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:

- TCR 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.

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 determined if these organizations were easily found online and the level of engagement and conversation occurring with current, past or potential visitors.

CE1 The destination has municipal websites that provide essential visitor information. [ALMOST]

CE2 The destination has tourism business websites that provide essential visitor information. [ALMOST]

CE3 Municipalities are represented on TripAdvisor. [ALMOST]

CE4 Tourism operators have TripAdvisor accounts. [NO]

CE5 The municipalities have Facebook accounts. [ALMOST]

CE6 Tourism operators have Facebook accounts. [ALMOST]

Table 4: Central region's Municipal Website Summary

Website Summary	**Municipalities**	
	Number in Region	% with Websites
Total number of towns/cities in the region	85	47% (n=40)
Total number of websites in region (incorporated and unincorporated with a basic tourism section)	40	45%
Of those 40 municipalities with websites		
Have visitor testimonials posted on their website	2	5%
Post photos of visitors engaged in the activity/experience	12	30%
Post photos of the location or infrastructure	37	93%
Post tourism related videos of visitors engaged in the experience	1	3%
Post videos of the location or infrastructure	1	3%
Have a tourism booking call to action on websites	13	33%
Have 'how to get here' visitor information on website	28	70%
Accept phone/email reservations for tourism booking	6	15%
Accept online reservations for tourism bookings	0	0%
Sign up for a tourism e-newsletter sign up option	1	3%
Have a contact page for the travel trade	1	3%
Have a destination/city/town tourism blog	1	3%
Have a link referring guests to their TripAdvisor Account	0	0%

Note 1: There are 46 service districts in the Central region. Analyzing their basic website, Facebook and TripAdvisor presence was not part of the scope of this study.

Table 5: Tourism Operators Online Summary Activity

Total Assets by Sector	Number of Assets	Percentage with Websites	Percentage with Trip Advisor	Percentage with Facebook
RV & Campgrounds	33	67%	0%	33%
Roofed Accommodations	178	71%	48%	38%
Culture and Heritage Based Assets	86	81%	48%	34%
Nature Based Assets	46	72%	20%	9%
Trails and Routes	133	57%	25%	20%
Man-Made Attractions	22	56%	36%	68%
Activity Based Businesses	26	85%	38%	69%
Outfitting Businesses	51	69%	0%	33%
People/Program Based Assets	47	30%	4%	21%
Festivals and Events	77	78%	10%	71%

Note: In some areas of the Central region Internet access remains limited and therefore the degree to which municipalities and operators can engage online is limited and will increase with time.

Table 6: Tourism Operator's Select Website Information

Website Information																
Business Sector	Number of assets	Website	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 TripAdvisor account
RV & Campgrounds	33	22	0	5	15	0	1	0	12	21	8	22	1	16	1	0
Roofed Accommodations	178	127	40	17	120	12	4	10	104	124	35	137	6	110	3	10
Culture and Heritage Based Assets	86	70	3	13	61	6	3	10	36	41	4	21	6	41	3	2
Nature Based Assets	46	33	0	5	21	0	0	2	16	4	6	8	0	3	0	0
Trails and Routes	133	76	1	10	39	4	13	3	31	26	17	20	5	29	1	0
Man Made Attractions	22	12	0	8	12	7	2	7	11	111	1	8	5	6	2	0
Activity Based Businesses	26	22	12	17	20	17	13	15	15	20	5	19	8	4	9	7
Outfitting Businesses	51	35	11	32	32	17	8	24	31	32	0	11	2	3	1	0
People / Program Based Assets	47	14	0	3	4	8	3	3	4	12	0	5	1	12	2	0
Festivals and Events	77	60	2	23	22	4	0	8	28	11	6	16	0	38	5	2
Totals	699	471	69	133	346	75	47	82	288	302	82	288	34	262	27	21
Percentage of those with a website *		67%	15%	28%	73%	16%	10%	17%	61%	64%	17%	57%	7%	56%	6%	4%

Table 7: Municipality TripAdvisor Summary

% are of those with a TripAdvisor Account	**Municipalities**	
	Number with a TripAdvisor Account	% of those with a TripAdvisor Account
# with a TripAdvisor Account	36	42%
# of Hotels/Accommodations (0 – 23 per listing)	129	
# of Restaurants (0 – 29 per listing)	149	
# of Attractions/Things to Do (0 – 18 per listing)	106	
Never respond with a comment to guests	-	100%
# that respond to guest reviews <50% of the time	-	-
# that respond to a guest reviews >50% of the time	-	-

Table 8: Municipal Facebook Summary

% are of those with a Facebook Account	**Municipalities**	
	Number with a Facebook Account	% of those with a Facebook Account
# with a Facebook account	21	25%
# of likes	13,526	
# of people talking	116	
# of visitors were here	2,011	
# with a link to their TripAdvisor account	0	0%
# with a Link to google map	21	100%
# with a link referring guests to their YouTube account	0	0%
# have direct links to companies sales pages	0	0%
# have a booking engine for businesses	0	0%
# accept credit card payments	0	0%

Table 9: Tourism Operator's TripAdvisor Presence

Business Sector	Number of assets	Account	Number of reviews	Number of visitor photos	Professional photos	Range of ratings out of 5	Zero comments	# comments in top 10 reviews	Responds <50% of the time
RV & Campgrounds	33	0	-	-	-	-	-	-	-
Roofed Accommodations	178	85	2373	856	47	1.5-5	1	36	3
Culture and Heritage Based Assets	86	41	302	170	13	3.5-5	19	0	0
Nature Based Assets	46	9	79	39	11	4.5-5	3	0	3
Trails and Routes	133	33	332	132	19	4-5	2	0	0
Man Made Attractions	22	8	102	52	3	35	2	0	0
Activity Based Businesses	26	10	430	293	74	4.5-5	0	21	0
Outfitting Businesses	51	0	-	-	-	-	-	-	-
People / Program Based Assets	47	2	121	100	2	4.5-5	0	0	0
Festivals and Events	77	8	22	78	0	4-4.5	2	0	0
Totals	698	195	3700	1698	169	1.5-5	29	57	6
Percentage of those with TripAdvisor pages*		28%			86%		15%		3%

Table 10: Tourism Operator's Facebook Presence

Business Facebook													
Business Sector	Number of assets	Facebook	• Number likes	# of people talking	Visitors were here	# posts in last 14 days	Link to their Trip Advisor page	Link to google map	Link to events	Link to special offers	Post photos	Post videos	Offer some type of engaging contest
RV & Campgrounds	33	11	4999	219	152	6	0	4	1	0	11	0	0
Roofed Accommodations	178	67	30834	2162	6598	60	5	48	5	1	59	17	2
Culture and Heritage Based Assets	86	29	10927	4885	15228	29	1	9	14	3	24	7	2
Nature Based Assets	46	4	4422	290	273	21	0	1	1	0	5	1	0
Trails and Routes	133	26	17882	1040	2687	82	0	4	5	0	21	3	0
Man Made Attractions	22	15	10471	466	3186	26	0	7	6	3	13	4	2
Activity Based Businesses	26	18	19483	184	4468	35	7	15	4	7	18	14	2
Outfitters Businesses	51	17	30144	117	11	10	0	14	1	1	16	7	0
People / Program Based Businesses	47	10	59341	658	24	53	0	1	2	0	9	4	0
Festivals and Events	77	55	39220	1946	6932	127	0	13	27	1	52	40	0
Total	699	252	227723	11967	39559	449	13	116	66	16	228	97	8
Percentage of those with Facebook accounts*		36%					5%	46%	26%	6%	90%	39%	3%

Key Findings for Municipalities

- 40 of the 85 municipalities (47%) in Central region have a website (Table 4). Of these, most have a tourism landing page that offers basic tourism information:
- 30% post photos of visitors engaged in the activity/experience, 93% post photos of infrastructure;
- 70% offer how to get here information;
- 3% post tourism related videos;
- 36 of the 85 municipalities are represented on TripAdvisor (42%), however none are currently replying to visitor reviews; and
- 21 municipalities have a Facebook account (25%) (Table 8). All of these Facebook pages have a link to a Google map, but none link to TripAdvisor, nor other engagement elements.

Implications/Considerations for Municipalities

- In some areas of the Central region internet access remains limited and therefore, the degree to which municipalities and operators can engage online with guests while they are in these areas is limited, however, will increase with time;
- Some municipalities that have a website could enhance their tourism landing pages by providing current information about their community, links to local area tourism operators, and a link to the provincial tourism website. This is especially valuable if visitors begin their travel search with a specific community they would like to visit, rather than trying to locate the community on the provincial tourism website;
- Municipalities with a website could enhance their tourism landing pages by:
- Providing relevant local area information about their community,
- Ensuring a link to the provincial website is easily found;
- Linking to user generated photos, videos, and testimonials to bring the landing page to life and add character; and
- Providing hyperlinks to tourism businesses in their community.
- Municipalities that have tourism assets and an interest in leveraging tourism as an economic driver but do not have a website, should ensure their community is on the provincial tourism website (e.g.: A search for Burlington reveals a presence for the community: http://www.newfoundlandlabrador.com/SiteSearch?Keyword=burlington). Municipalities may also wish to optimize other tools to share their tourism story with visitors by enhancing their interaction on Facebook, launching a community visitor's log or guest book, and providing links to connecting to relevant YouTube videos.

Key Findings for Operators

- 67% of the 699 tourism assets identified in Table 6 have a website. This is on par with the Eastern region, higher than Labrador region (62%) and lower than the Western region (80%);
- Businesses with websites vary across all segments of the industry ranging from 55% for man-made attractions and 57% for trails and routes on the low end, to 85% for activity-based businesses on the upper end. The single outlier is people/program based assets (30%) which is to be expected as this is a new category and not documented in TDMS;
- Business websites post a great deal of infrastructure imagery (73%) but only 16% include photos with visitors engaged in experiences. Professional photos or linking to user-generated content are two options operators can use to remedy this immediately by posting engaging images on an on-going basis to keep it fresh;
- Calls to action are low (17%), as is online reservations (17%), however, just over half (57%) accept credit card payments, something that should be encouraged for other operators;
- Helping visitors find where the business is located is beneficial for guests and provided by 61% of the operators. The remaining 39% should add this element immediately;
- Telling the story is a way to help sell tourism, as evidenced by the award-winning leadership approach the province has taken; ways for operators to add their story and connect with guests includes a blog – yet only 6% have one. Newsletters (7%) are also rarely used, nor are visitor testimonials (15%), or links to a TripAdvisor account (4%);
- 28% of businesses across all sectors take advantage of TripAdvisor. This is less than the Eastern region (31%), higher than Labrador (11%) on par with Western region (28%) (Table 9);
- On the high end of the spectrum of TripAdvisor users are roofed accommodations (48%) culture and heritage based assets (48%) and activity based businesses (38%)
- On the low end are festivals and events (10%), program-based businesses (4%), and none of the outfitting businesses;
- Of those with a TripAdvisor page, 86% have professional photos posted;
- Few operators (15%) are engaging with their guests by providing feedback to consumer reviews;
- Only 3% of businesses with a TripAdvisor account have a TripAdvisor link on their Facebook page making it easy for guests to move between the two places where visitor

feedback/reviews are located.

- 252 (36%) of the tourism businesses within the Central region have a Facebook page. Of those, 90% post photos, 39% videos, and 46% have a link to google maps.
- 36% of assets have a Facebook account, a small number compared to the popularity of this social media site (Table 10);
- Festivals and events (71%), activity based businesses (69%) and man-made attractions (67%) (68%) lead with a Facebook presence. Outfitters have a 33% presence, roofed accommodators with 38%, culture/heritage based assets 34% few related to trails and routes (20%) and nature based (9%); and

The people/program based assets have the most number of "Likes" (59,341) followed by festivals and events (39,220).

Implications/Considerations

- The provincial tourism website (www.newfoundlandandlabrador.com) is the primary source for providing relevant and helpful visitor information to potential visitors about travel to and within Newfoundland and Labrador and should remain as robust as possible as the primary source of information for travellers. Operators must take care and diligence when completing their TMDS Tourism Operators Profile form each year so that visitors have an accurate and up-to-date understanding of the business. Creating and presenting packages that can be sold via the provincial website is also strongly recommended.
- 33% of tourism assets do not have a website. This should be a big concern for those operators since this is where the vast majority of travellers will go to learn about their company, to plan their trip and make reservations. Operators may have a great product, but if the consumer can't locate the business online, that business won't be in the consideration set of the majority of travellers;
- Operators with a website need to optimize this channel and ensure what is available matches the expectations, and interests of visitors. Consideration needs to be given to:
- Adding visitor testimonials;
- Increasing the number of photos of visitors engaged in the experience;
- Ensuring a clear call-to-action exists and is easily found as guests move through the website;
- Including detailed information on 'how to get here'. This can include a link to Google earth, a PDF downloadable map, GPS coordinates – anything that will easily help a visitor find the community and business;
- Identifying which online booking engines could be used to drive more visitors to the businesses and/or installing their own online booking engine;
- Adding links to their other social media sites (e.g. TripAdvisor, Facebook, Twitter, YouTube, Instagram) so visitors can quickly move around 'your world' for different types of information, including user generated feedback which is important.
- The power of TripAdvisor and Facebook is not being fully leveraged. Operators can quickly begin to:
- Ask their guests where they get online travel information to confirm if Facebook, TripAdvisor, Instagram or many of the other sites are feeding them information that influences, or influenced their travel decision to book;
- Look for user-generated images and content from guests posting and link this to your website to add the 'voice of the customer', and;
- Begin to have regular conversations with guests by responding to TripAdvisor reviews, posting information to Facebook about the area, upcoming activities, and creating a buzz about your community and contributing to creating an overall appeal for the destination.
- Given outfitting is not a defined category on TripAdvisor, customers may not think to use this online review channel when looking for a place to hunt or fish. NLOA could work with operators to determine where the online conversations are happening for hunting and fishing and work with all outfitters to begin to drive an enhanced online presence; and
- Adventure Central can review the TDVAA database to create lists of companies that are not using the basic online tools of value to travellers and connect them to HNL for training. The training should be designed to be practical and results oriented by providing relevance (e.g.

Why be on TripAdvisor), research (evidence), active 'hands on keyboard' experience (actually create an account for their business), information about the norms for what visitors expect in terms of interaction (e.g. responding to a TripAdvisor review, adding helpful info on Facebook) and how to manage time, so that once an online social channel is opened, the conversation occurs on a regular basis.

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 People/Program Businesses Demand Generators / Visitation Motivators	Identifies the core tourism assets and demand generators that contribute to a positive visitor experience and motivate travelers 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. [ALMOST]

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. [NO]

IB4: The destination offers a variety of water-based amenities to accommodate visitors travelling by watercraft. [NO]

Table 11: Transportation Summary for Central Newfoundland

Transportation Sector	Number servicing the region	Number of service locations	Year round service*	High-season service only	6-month of the year service
Airlines	5	1	80%	0%	20%
Ferry Companies	1	6	100%	0%	0%
Car Rental Companies	6	8	100%	0%	0%
Bus/Coaches	4	Entire region	100%	0%	0%
Taxi Companies	26	15[1]	100%	0%	0%
RV Rental Companies	0	-	-	-	-
Visitor Rail Access	0	-	-	-	-
Public Transit	0	-	-	-	-

1 Note: While there are a number of companies that operate within a community as 'home base', BTCRD confirmed that many prefer to stay inside the catchment with the occasional trip outside, which differs from regions such as Eastern and Western where the taxi drivers are reported to frequently take longer trips.

Table 12: Cruise Summary for Central Newfoundland

Cruise Lines	# of Ports of Call Visited	Major Cruise Lines	Adventure/ Expedition Cruise Lines	# Guest Projections for 2015	# Itineraries for 2015
Adventure Canada	1	–	✔	198	4
Linbald Expeditions	1	–	✔	148	1
Silversea	1	–	✔	140	1

Table 13: Harbours Impacting Tourism

Harbours Impacting Tourism (n = 26)	Location	Meters of Draft	# of Jetties	# of Boats	# of marinas
Fleur de Lys	Baie Verte Peninsula	3 to 10	1	-	0
Pacquet	Baie Verte Peninsula	3 to 10	1	-	0
La Scie	Baie Verte Peninsula	23.2+	1	20	0
King's Point	Green Bay	1 to 10	1	10	0
Springdale	Green Bay	7.1-9.1	1	10 to 20	1
Little Bay Island's	Green Bay	2 to 10	1	6	0
Triton	Green Bay	1 to 7	0	6	0
Botwood	Bay of Exploits	23.2+	1	10 to 20	0
Lewisporte	Bay of Exploits	15.5-16	11	70 to 120	1
Exploits Island	Bay of Exploits	1 to 10	0	-	0
Twillingate	Twillingate	11-12.2	2	20 to 50	1
Joe Batt's Arm	Fogo Island	1 to 4	1	1 to 6	1
Seldom Come By	Fogo Island	3 to 27	1	10 to 15	1
Carmanville	Gander Bay	1 to 30	1	various	0
Wesleyville	Bonavista North	1 to 10	0	various	0
Glovertown	Bonavista North	1 to 15	2	30	1
Happy Adventure	Bonavista North	-	2	~10	0
Grey River	South West Coast	-	1	4	0
Gaultois	South West Coast	-	0	10	0
Francois	South West Coast	-	2	10	0
McCallum	South West Coast	-	0	4	0
Newman Sound, TNNP	Terra Nova National Park	2 to 5	2	4 to 10	0
Hermitage	Connaigre Peninsula	-	3	20 to 40	1
Belleoram	Connaigre Peninsula	-	2	20	1
Harbour Breton	Connaigre Peninsula	-	4	30	1
Pool's Cove	Connaigre Peninsula	-	1	4	0

** Note: Number of meters of dock wall in the data was not available, and there was no information available on mooring rates.*

Table 14: Amenities of the Harbours Impacting Tourism

Harbours Impacting Tourism N=26	Number with Amenities	%
Gas	23	88%
Restaurant	22	85%
Showers	21	81%
Laundry	18	69%

Note: BTCRD identified that even though they have a gas station, this does not necessarily have fuel services at the waterside where boaters require them.

Table 15: Economic Impact of the Gander International Airport[45]

Type of Impact	Employment (Person Years)	Wages ($Millions)	GDP ($Millions)	Economic Output ($Millions)
Direct Impacts	1,260	90	140	240
Indirect	390	20	40	70
Induced	290	10	30	50
Total Impacts	1,940	120	210	360

Note: These impacts are based on a review of the 2014 operations, as stated in the report.

Table 16: Gander Airport Passenger Activity[46]

Gander Airport Passenger Activity	2011	2012	2013	2014
Boarding Passenger movements Jan - Dec	61,102	63,945	67,426	71,622
Deplaning Passenger movements Jan - Dec	58,343	62,280	66,169	70,362
Total Passenger movements Jan - Dec	119,445	126,225	133,595	141,984

Note: BTCRD confirms there are three additional small airstrips where small planes can land on Fogo Island, in Springdale Junction and the Exploits Valley.

[45] Inter*VISTAS.* (2014). *Gander international airport: Economic impact study.* Page ii. Retrieved from: http://www.ganderairport.com/wp-content/uploads/2014/11/YQX-Economic-Impact-Study-11Sept2014-FINAL-REPORT.pdf

[46] Government of Newfoundland Labrador (2015, May). *Central region performance indicators as of 11 May 2015.* Document provided by the NL Department of Business, Tourism, Culture and Rural Development.

Table 17: Provincial Summary Estimates of Non-Resident Tourism Visitation and Expenditures[47]

Mode	2013		2014		Percent Change	
	Visitors	Expenditures $M	Visitors	Expenditures $M	Visitors	Expenditures $M
Auto	99,900	$92.2	62,600	$87.1	-7.3	-5.4
Air	67,200	$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 2011 Newfoundland and Labrador Air and Auto Exit Survey Program and annual Travel Indicator Program, Data subject to revisions.

Table 18: Fogo Island/Change Islands Ferry Traffic (Departing Farewell)[48]

May to October	2011	2012	2013	2014 (May to Aug Only)
Passenger movements	49,066	54,569	47,037	33,576
Passenger related vehicles (TEUs)	28,410	27,333	24,227	16,668

Note: TEUs are a measurement unit that stands for "twenty-foot equivalent unit". Vehicle data is entered in increments of 5 feet. E.g.: A 70-foot tractor trailer would be 3.5 TEUs. Most passenger vehicles are 20 feet or 1 TEU.

Key Findings

- Provincially, non-resident auto traffic is continuing on a downward trend; 2014 was the fifth consecutive year where non-resident auto traffic decreased, with overall visitation declining 7.3% compared to the year before.[49] These declines are a result of volatile gasoline prices, Marine Atlantic ferry ticket prices, passport requirements, changing traveller vacation habits, time considerations by travellers to get to their destination faster, and more air travel options.
- Boarding and deplaning passenger numbers at the seven major airports increased 6.4% in 2014 compared to 2013. The direct impact on the Central region cannot be ascertained.

> "Passenger traffic at Gander has doubled over the last decade and we are forecasting continued growth… The new airport terminal, while half the size, will triple the current capacity in the critical arrivals and departures areas. It will also allow the airport to continue to service the all-important business of international aviation… The airport authority has been able to grow its revenue and control

- **Air:** While the vast majority of traveller movements to, within and across the province are

[47] 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.

[48] Ibid.

[49] Ibid.

serviced by St. John's International Airport (YYT), the Central region is fortunate to be the home of the Gander International Airport (YQX), whose economic impact is significant by generating annual direct impacts of $90 million in wages, $140 million in gross domestic product (GDP), and $240 million in economic output. (Table 15).

- As a major revenue generator for the municipal, provincial and federal governments, total taxes paid on an annual basis, by passengers, employers, and employees at YQX, are estimated at $46.7 million per year of which the provincial government received $18.9 million in tax revenues, and municipal governments also benefited from approximately $1 million;[50]
- As of the end of Q3 (January to September) 2014, the Gander Airport was reporting a 6.5% increase in passenger traffic in part due to lengthening Air Canada's non-stop service to Toronto. In March 2015, Sunwing added an extra route to Orlando, Florida which should further contribute to growth;[51]
- As of May 4th, 2015 Provincial Airlines launched its new service that will connect Gander directly with Goose Bay, Labrador and St. John's, Newfoundland on board Provincial Airlines full service flights[52] and as of July 15, 2015, WestJet will return to Gander International Airport with service to Halifax, Nova Scotia and Toronto, Ontario;[53]
- Effective in its marketing, in 2014 the Gander Airport was the only airport in NL to garner three awards at the Airports Council International-North America (ACI-NA) Marketing and Communications Awards, including:
- 1st Place in the Brochures Category
- 1st Place in the Radio Advertising Category, and
- 3rd Place for Creative Innovation in Promotional Items.[54]
- The airport currently serves: Air Canada, Provincial Airlines, Evas Air and Sunwing, all of which provide year-round service to the Central region and WestJet, which provides seasonal service;
- The Gander Airport has seen steady positive year over year gains in boarding passenger movements, deplaning passenger movements, and total passenger movements (Table 16);
- A $40 million investment in a new Airport Terminal building is being proposed;[55]
- The historical importance of the Gander Airport's international arrivals area as a unique aspect of NL's heritage, combined with the potential growth of the aviation museum, were identified as noteworthy tourism assets to support; and
- There are three additional airstrips providing entry throughout the region for small aircraft travel. In all three locations, ground taxi services are available to access tourism experiences in the Exploits Valley, Green Bay and on Fogo Island. There may be an opportunity to entice some of the higher spending Fogo Island clientele into other sub-regions in Central via these air access points.
- **Ferry:** Three car ferries operate in the Central region servicing Fogo Island and Change Island from Farewell, as well as St. Brendan's from Burnside and Little Bay Island and Long Island from Pilley's Island. There are three regional foot passenger ferry services: (1) Francois and Grey River from -Burgeo, (2) Galtois and McCallum from Hermitage and (3) Rencontre East and Bay L'Argent from Pool's Cove. All provide year round service (Table 11). Additionally, it

---

[50] Ibid.

[51] Gander International Airport (2014, Oct 9). *Passenger performance grows at Gander.* A press released retrieved from: http://www.ganderairport.com/article/passenger-performance-grows-at-gander/

[52] PAL (2015, April 15). *Provincial Airlines announces new Gander service.* Retrieved from: https://www.provincialairlines.ca/fly-pal/pal-news/

[53] Gander International Airport (2015, Jan 19). *WestJet returns to Gander.* Retrieved from: http://www.ganderairport.com/article/westjet-returns-to-gander/

[54] Gander International Airport (2014, Jun 20). *Gander airport receives three marketing awards.* Retrieved from: http://www.ganderairport.com/article/gander-airport-receives-three-marketing-awards/

[55] Gander International Airport (2015, Jan). *New ATB FAQ.* Retrieved from: http://www.ganderairport.com/new-atb-faq/

was learned that:

- The lack of ability to book the car ferries ahead of time impedes the ability of a motor coach operator to plan itineraries to Fogo Island;
- Not all ferries accept debit or credit cards. The St. Brendan's 45-minute ferry that travels from Burnside to St. Brendans, operated by the Province, accepts vehicle traffic, but payment must be made in cash;
- There is very little directional signage and information for the ferry passengers to know where to pay, line up, board and disembark;
- The public washroom facilities at the Farewell ferry docking locations are reported to be extremely unpleasant due to their smell which is exasperated on warm days; and
- Additionally, there are two themed coastal adventures that use ferries and are promoted in the 2015 Travel Guide including the South Coast Adventure from Hermitage to McCallum, Francois, Grey River, Ramea and on to Burgeo, and the second being the Fortune Bay Adventure from Pool's Cove to Recontre East and onto Bay L'Argent.
- **Vehicle Rentals:** Six car rental companies operate in the region. Avis, Budget, and Thrifty's operate from Gander only, Enterprise from Gander and GrandFalls - Windsor, Delta in Grand – Falls Windsor and National is in three communities - Gander, Lewisporte and Grand Falls-Windsor. All car rental companies operate year round; and there are no RV rentals available at the Gander Airport (Table 11).
- **Taxis:** 26 companies service the Central region in 15 of the 85 municipalities, but there is no specific company servicing travellers needs to travel from the Gander Airport to and throughout Fogo Island.
- **Motor Coach:** Three motor coach companies service the Central region year-round including DRL, Buckles Bussing, and Thornhills Bussing. These companies bring guests to communities, however, once in the area, visitors do not have any means to get around other than on foot:
- DRL runs buses on a regular schedule province-wide and does charters; and
- Buckles Bussing is a charter bus company
- **Cruise ships:** Three expedition cruise companies are offering six itineraries in 2015: Adventure Canada (4), Linbald Expeditions (1), and Sliversea (1). This is double the 2014 numbers of cruise ships in the region (2 Adventure Canada and 1 Linbald Expeditions), but overall compared to other areas of the province, this is not a significant tourism driver in the region (Table 12).[56]
- **Harbours:** There are currently 26 harbours impacting tourism in the region (Table 13). There are another 101 providing water access in the Central region but they are not designed to meet the needs of cruise ships or recreational boaters.[57] Of the 26 harbours in the region servicing visitors:
- Nine harbours have marinas, and the number of boats that can be accommodated in the different harbours ranges from one to four on the low end and to 120 boats in Lewisporte, up to 50 in Twillingate, 30 in Harbour Breton, 52 in the Bay of Exploits, 23+ in Burgeo, 15 in Glovertown, and 10 in a number of communities such a King's Point, Pacquet, Fleur de Lys, Seldom Come By, Wesleyville, Little Bay Islands; and
- Efficiency units and a 16-person hot tub will open in 2016 at By the Sea Inn and Café in King's Point. Their goal is to create a differentiated visitor experience for all recreational boaters and an opportunity to connect with people staying at the property. It is a unique infrastructure addition to enhance the visitor experience. Guests docking at the Inn are in close proximity to the Humpback Whale Pavilion, Alexander Murray Hiking Trail and the Rattling Brook Falls.
- **Rail:** There is no rail service in Newfoundland.
- Regional transportation challenges identified include:

---

[56] Cruise NL. (2014, Nov). Newfoundland and Labrador 2015 cruise statistics. Retrieved fro www.cruisetheedge.com

[57] The distance from the harbour to the downtown area of the community was not collected within the scope of this study, but identified by Adventure Central as an important variable for their region.

- Road quality was reported as poor by stakeholders due to a significant amount of potholes;
- Lack of effective and well-placed way-finding signage for visitors, as well as very limited interpretive signage at many tourism attractions, ferries, towns and tourism destinations; and
- Working with the harbour authorities to have them look beyond fishing and local transportation and appreciate the value of tourism and recreational boating.
- The region appeals to motorcyclists, ATV'ers, cyclists, snowmobilers, and RV'ers, as well as recreational boaters, but there is a lack of understanding regarding the needs and opportunities of visitors travelling by these means, or the potential for increased traffic via these alternative transportation means.

Implications/Considerations

- Stakeholder interest in preserving the International Lounge at the Gander Airport was identified as a priority as it is a unique piece of NL and Canada's air transportation heritage. As the airport moves forward on its development plans, careful consideration should be given as to how this heritage asset can be preserved while being repurposed;
- There is no high-end limousine service, or professional chauffeur guides to service the emerging guests being attracted to the region because of the presence of the Fogo Island Inn.
- Given the notoriety of *Iceberg Alley*, the historical appeal of the ocean as NL's original highway, and the stories attached to resettled communities, recreational boating emerged as an area of development opportunity in order to increase tourism traffic by sea and land;
- Opportunity for a private water taxi service to be introduced in the tourism season from Twillingate to the small islands to provide increased access, complete with an on-board guest experience for travellers who would like personalized experience and connecting their transportation/guide options on the island; and
- Research into visitor transportation modes could provide more detailed or consolidated customer profiles related to recreational boaters, motorcyclists, ATV'ers, cyclists, snowmobilers, and RV travellers.

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=1	Regional N=7
Number with public washrooms	100%	100%
Number with free internet access or Wi-Fi	100%	0%
Number with password internet access or Wi-Fi	0%	43%
Number that operate year round	0%	14%
Number that operate 6 months of the year	100%	0%
Number that operate high season only (Jun – Sep)	0%	86%
Total number of VIC staff	2	23
Provide print information	100%	100%
Gift shop/retail	0%	71%
Video viewing area	100%	14%
Picnic area or place to sit and eat	100%	57%
Able to purchase food	0%	0%
Museum or displays/artefacts available	100%	29%
Guest computer available for visitor use	100%	100%
Place to plug in and charge electronics	100%	100%
Staff regularly Tweet about destination	0%	0%
Staff regularly update regional/VIC Facebook account	0%	57%
Able to make bookings/reservations for traveller	100%	71%

Table 20: Terra Nova National Park Visitor Centre Statistics 2011 – 2014[58]

Terra Nova National Park Visitor Centres (Year to date October 2014)					
	2011	2012	2013	2014	2011-2014 Change
	Total number of visitors				
Visitor Centre	14,823	13,839	16,676	19,760	+ 33%
Activity Centre	3,994	3,613	2,355	2,910	-27%

[58] Data provided in an email from Tara Casey, Terra Nova National Park, Parks Canada.

Table 21: Central Region Visitor Information Centre Statistics 2012 – 2014[59]

Central Region Tourism Indicators

Provincial Visitor Information Centres (1)				
Notre Dame Junction	2011 Season	2012 Season	2013 Season	2014 Season
Operating Season	May 2 – Oct 14	May 7 - Oct 12	May 17 – Sept 27	May 14 - Oct 3
Visitation	7508	6,679	6,562	5,201

Regional Visitor Information Centres (7)	2011 Season	2012 Season	2013 Season	2014 Season
Gander	10,298	12,304	13,648	n/a
Grand Falls – Windsor	4,159	4,187	4,379	3,774
Green Bay	9,693	9,194	10,481	8,989
Fortune	6,758	8,760	4,458	4,695
Newville	5,399	5,104	4,237	5,210
Glovertown	338	296	n/a	n/a
Conne River[1]	n/a	n/a	n/a	n/a

[1]Note: Information was not available.

Key Findings

- There is one provincial and seven regional Visitor Information Centres (VICs) in the Central region (Table 19), however, no information was available for the Conne River VIC;
- 100% of the regional and provincial VICs within the Central region offer washroom facilities, provide print information, and have a place to charge electronic devices;
- Free Wi-Fi is available at the provincial VIC and is available with a password in three of the regional centres (Gander, Baie Verte and the Grand Falls), there is no evidence of available Wi-Fi at the four remaining VICs;
- The Gander International airport has brochures on display but no official VIC at this time;
- VICs can assist with reservations at any tourism businesses (accommodations, activities, etc.) Most do not make bookings per se Adventure Central NL is currently connecting with different VIC's to learn more about their connections with accommodations.
- Only the Gander VIC is open year round; it employs two full-time staff and two seasonal staff. The remaining centres operate in high season June through August, employ between two to six part-time and seasonal staff, providing a total of 23 jobs annually;
- Video presentations are available at the Notre Dame Junction provincial VIC as well as the Coast of Bay's Mi'Kmaq Discovery Centre VIC in Conne River;
- Gift shop/retail items are available at all of the regional VICs except Glovertown and Newville but not at the provincial VIC;
- Food is not available to purchase at any of the locations;
- Four of the regional VICs (Newville, Gander, Baie Verte and Coast of Bays - Mi'Kmaq Discovery Centre) have a Facebook page. The provincial VIC does not have a Facebook page; however, the travel councilors respond to questions on the NL Facebook page;
- Parks Canada's Visitor Centre within Terra Nova National Park saw a 33% increase in guests,

[59] Government of Newfoundland Labrador (2015, May). *Central region performance indicators as of 11 May 2015.* Document provided by the NL Department of Business, Tourism, Culture and Rural Development.

while their servicing/counselling activity saw a 27% decrease between 2011 and 2014 (Table 20). The Visitor Activity Centre is located in Newman Sound Campground. It offers story time, arts and crafts activities, games, puzzles, computer games, movie time, videos and a Junior Naturalist Program. It is important to note that visitation numbers to the Activity Centre cannot be interpreted as being reflective of the "counseling activity" conducted at the Visitor Centre.

- The term '*Tourist Chalet'* was commonly used during stakeholder validation sessions instead of Visitor Information Center;
- The Exploits Valley VIC building is up for sale and as a result did not operate in 2015 and was not included in the data;
- The Newville VIC building that currently services Twillingate has been sold.[60] It did open for business in the summer of 2015 (Monday to Friday 8:00 – 3:00). It is anticipated it will cease operation into the future.
- Fogo Island opened a new VIC for the summer of 2015. Given that the Gander/East Twillingate/Terra Nova is the third most visited part of the province for non-resident travellers, Twillingate stakeholders raised a concern that there is a need for a VIC on both Fogo Island and in Twillingate for those guests who need information but will not be travelling to the island;
- Inconsistencies also exist with the hours of operation and seasonality between the different VICs in the Central region can cause travellers confusion and frustration as they may not be able to access the information or visitor amenities.
- VICs have staff positions that are funded by job creation program, resulting in a high annual staff turn-over, thus decreasing the long-term knowledge base of the people providing information to guests;
- In a 2012 Parks Canada Terra Nova National Park Visitor Information Program[61] the following information was reported:
- Over one half of the 398 respondents who completed a survey (57%) indicated they were aware of the park from a "previous visit/knowledge", while 37% noted that "friends/ family" had made them aware;
- The majority of survey respondents (68%) had been to the park before, while 32% were visiting for the first time;
- 275 of the 398 respondents visited the Terra Nova Visitor Centre; of those, 55% were "very satisfied" and 33% were "satisfied" with their Terra Nova Visitor Centre experience;
- Further, 83% were "very satisfied" with "providing service in your official language of choice" and 75% with staff "being courteous"; and
- Parks Canada staff also rated very high for "staff welcome at arrival" (66%), as well as "responding to comments or complaints" (62%).

[60] Team communication from Shannon Pinsent, Adventure Central

[61] Parks Canada. Terra Nova NP Visitor Information Program, Final Report. Report presents the results of a visitor survey that was conducted during the summer of 2012 and includes responses from 398 completed surveys.

Implications/Considerations

- Visitor servicing in the Central region must be examined in consideration of the full customer experience typically associated with a VIC – the physical entity (access to washrooms, water, electronic charging stations, Wi-Fi), as well as the emotional component (connecting with locals to secure local area information – be that in-person, via an online chat, or a knowledgeable person at a call centre);
- Bed & Breakfast operators confirmed in stakeholder sessions that they provide extensive visitor information; ensuring they are well informed will be important should they be considered to assume the role of providing personalized visitor services in the future;
- Having increased visitor services and information on the six regional ferries would provide information en route to and from the islands and coastal communities;
- Regional partners may wish to consider developing creative alternatives to visitor servicing, similar to those that other jurisdictions across Canada are exploring. For example, establishing new relationships with private sector partners, such as gas stations or museums, locating an information kiosk at high traffic locations, creating a visitor service agreement and training program with independent businesses owners; all these examples could create a win-win investment in visitors and community businesses;
- Given that a high percentage of visitors at the Terra Nova National Park VIC, it is important that information be made available beyond that specific to the park itself, this could include information about other nearby attractions, guided experiences, accommodation and food and beverage options. The federal policy on bilingualism however, makes this a challenge;
- The success of physical VICs is a shared responsibility between the local tourism operators, municipalities and the centre staff to ensure they have the 'locals know' information that will excite and prepare travellers. The VICs should not be entirely dependent on the provincial tourism website for information, which many travellers would have access to on their mobile device. Additional ways to gain knowledge are through familiarization tours (FAM), company videos, reviewing TripAdvisor sites and having an annual briefing from businesses; and

Volunteer visitor ambassadors could also be encouraged to be out in communities at key times, or at key locations to help share information with guests and/o r share their knowledge of the region via blogs, posts to Facebook, posting images, etc.

Photo: Boats in the Botwood Marina
Credit: Newfoundland and Labrador

ACCOMMODATION BASE

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

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

Table 22: Newfoundland and Labrador Roofed Accommodation Occupancy by Region[62]

Region	2013	2014	Point Change	Average Daily Rate
Province	51.6	51.0	-0.6	$132.5 (+3.7%)
Avalon Region	66.3	62.4	-3.9	$144.29 (+4.5%)
Eastern Region	36.7	42.8	6.1	$115.03 (-1.9%)
Central Region	41.0	40.4	-0.6	$121.52 (+6.5%)
Western Region	39.0	40.6	1.6	$118.99 (+1.8%)
Labrador	61.2	56.7	-4.5	$130.85 (+2.6%)

Accommodation Module, Tourism Destination Management System (TDMS)
Department of Business, Tourism, Culture and Rural Development. Sept. 2015, subject to revision pending further reporting.

[62] Government of Newfoundland Labrador (2015, Mar.) *Year-End Provincial Tourism Performance 2014.* Document provided by the NL Department of Business, Tourism, Culture and Rural Development.
http://www.btcrd.gov.nl.ca/publications/recreation/2013/Provincial_Occ_Rates_By_Region_2013.pdf

Table 23: Accommodation Statistics for the Central Region

Category	# Of Properties (211)	# Of rooms /sites	Daily Price Range	% Year Round	% High Season (May – Sept)	% Open at least 6 months
Hotel/Motel	33	894	$55 - $350	88% (n=29)	6% (n=2)	6% (n=2)
B&B	64	277	$35 - $400	45% (n=29)	38% (n=25)	17% (n=11)
Inns	7	55	$75 – $219	86% (n=6)	0%	14% (n=1)
Fogo Island Inn	*Included with above %*	*29*	*$875 - $2,875*	*Included with above %*	*Included with above %*	*Included with above %*
Cottages, Vacation House Rental Hostels	74	391	$55 - $397	50% (n=37)	30% (n=22)	20% (n=15)
Campgrounds	33	2,125 Sites (55% full service)	$10-$45	0%	100% (n=33)	0%

Source: TDVAA Data Collection Template.

Note 1: Fogo Island Inn has been isolated from the figures due to its unique high-end character which impacts the presentation of the rooms and rates of inns

*Note 2: A total of 20 new properties were opened in the Central region in 2014 and 2015.*63

Table 24: 2014 Star Rating Across All Categories by Region[64]

Star Grade	1.0	1.5	2.0	2.5	3.0	3.5	4.0	4.5	5.0	Total	2013
Avalon	0	0	2	30	19	43	52	18	2	166	171
Eastern	0	0	2	15	12	28	33	12	0	102	107
Central	0	0	4	25	32	43	35	12	1	152	146
Western	0	0	4	41	37	75	33	24	0	214	244
Labrador	0	0	1	23	5	9	1	0	0	39	34
Total	0	0	13	134	105	198	154	66	3	673	702

[63] Government of Newfoundland and Labrador. (2015, July 15). *New Central region facilities 2014 and 2015.* A document provided by BTCRD.

[64] Ibid

Table 25: 2014 Central Region Star Rating Across All Categories[65]

Star Grade	1.0	1.5	2.0	2.5	3.0	3.5	4.0	4.5	5.0	Total	2013
B&B	0	0	1	3	8	21	19	4	0	56	56
Hotel/ Motel	0	0	2	14	6	4	1	0	0	27	28
Cottages	0	0	1	8	17	15	14	7	0	62	55
Inns	0	0	0	0	1	3	1	1	1	7	7
Total	0	0	4	25	32	43	35	12	1	152	146

Table 26: Provincial Occupancy 2009 - 2014[66]

Year	Room Nights Available	Room Nights Sold	Occupancy Rate	Room Revenue	REVPAR	ADR
2014	2,730,276	1,388,480	50.85%	$183,971,181.34	$67.38	132.50
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						
Jan-Mar	612,800	242,454	39.56%	29,795,606.21	48.62	$122.89
Mar-Jun	690,803	334,761	48.46%	44,534,717.92	$64.47	$133.03
Jul-Sep	729,242	492,025	67.47%	69,131,424.41	$94.80	$140.50
Nov-Dec	615,557	280,987	45.65%	36,623,552.55	$59.49	$130.34

Source: Accommodation Component of TDMS II

Data for 2014 is based on information received and entered into TDMS as of September, 2015

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 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: Occupancy for Economic Zones 11 - 14 (Central Region)[67]

[65] Ibid

[66] Government of Newfoundland & Labrador. (2014). *2003-2013 Occupancy REVPAR ADR province west region zone 6-10.* A western region accommodation special data run from the TDMS provided by the Department of Business, Tourism, Culture and Rural Development. The year-end provincial statistics were contained within the Western Region data sheet and not duplicated in the Central region occupancy update of 11 May 2015.

Year	Room Nights Available	Room Nights Sold	Occupancy Rate	Room Revenue	ADR
2014	446,178	179,349	40.20%	$21,822,520.04	$121.68
2013	448,433	183,960	41.02%	$20,444,866.97	$111.14
2012	474,367	185,308	39.06%	$19,684,499.63	$106.23
2011	474,347	191,288	40.33%	$19,518,866.22	$102.04
2010	476,885	189,593	39.76%	$18,504,900.75	$97.60
2009	474,697	184,760	38.92%	$17,403,997.82	94.20
2014 by Quarter					
Jan-Mar	99,609	28,769	28.88%	$3,098,493.55	$107.70
Mar-Jun	115,453	43,318	37.52%	$5,158,411.09	$119.08
Jul-Sep	129,886	75,609	58.21%	$9,986,425.81	$132.08
Nov-Dec	101,230	31,653	31.27%	$3,579,189.59	$113.08
	446,178	179,349	40.20%	$21,822,520.04	$121.68

Source: Accommodation Component of TDMS II

Data for 2014 is based on information received and entered into TDMS as of May 11, 2015

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 considered as preliminary/estimates. Room nights sold, room nights available and room revenue should be considered counts/totals for the sample (properties) reporting.

[67] Government of Newfoundland Labrador (2015, May, 11). *Occupancy and ADR levels for Central Region 2003 – 2014.* Document provided by the NL Department of Business, Tourism, Culture and Rural Development.

Table 28: Central Region Accommodation Statistics 2011 – 2014 by Property Type[68]

Roofed Accommodation Occupancy - Central Region				
Summary Information				
Jan-Dec All Properties	2011	2012	2013	2014
Occupancy rate	40.3	39.1	41.0	40.2
Room nights available	474,347	474,367	448,433	446,178
Room nights sold	191,288	185,308	183,960	179,349
ADR	$102.04	$106.23	$111.14	$121.68
Jan- Dec Hotels/Motels	2011	2012	2013	2014
Occupancy rate	44.4	43.1	45.6	43.1
Room nights available	325,670	319,627	297,597	302,959
Room nights sold	144,563	137,914	135,716	130,469
ADR	$99.07	$102.78	$106.66	$109.08
Jan- Dec B&Bs/Inns	2011	2012	2013	2014
Occupancy rate	29.7	28.9	32.1	34.1
Room nights available	83,052	84,299	81,135	78,138
Room nights sold	24,690	24,381	26,027	26,666
ADR	$101.47	$104.95	$112.04	$165.85
Jan- Dec ALL Cottages/Cabins	2011	2012	2013	2014p
Occupancy rate	33.6	32.7	31.9	34.1
Room nights available	65,625	70,441	69,701	65,081
Room nights sold	22,035	23,013	22,217	22,214
ADR	$122.12	$128.22	$137.44	$142.61

Source: Accommodation Component of TDMS II

Data for 2014 is based on information received and entered into TDMS as of May 11, 2015.

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 considered as preliminary/estimates. Room nights sold, room nights available and room revenue should be considered counts/totals for the sample (properties) reporting.

[68] Government of Newfoundland Labrador (2015, May). *Central region performance indicators as of 11 May 2015.* Document provided by the NL Department of Business, Tourism, Culture and Rural Development.

Table 29: Terra Nova National Park Campground Statistics 2011 – 2014[69]

Terra Nova National Park Campgrounds (Year to date October 2014)				
	2011	2012	2013	2014
Newman Sound	13,925	14,888	15,721	15,771
Malady Head	1,092	1,246	1,501	1,711
Total Nights	15,017	16,134	17,222	17,482
GROUP TENTING	60	63	39	55

Table 30: Commercial Campgrounds in the Central Region 2011 – 2014[70]

Central Region Commercial Campgrounds (May to October)				
	2011	2012	2013	2014
Occupancy rate	51.6	51.2	54.7	60.2
Site nights available	170,605	182,526	192,707	201,321
Site nights sold	88,064	93,371	105,472	121,249
ADR	$15.78	$15.56	$15.04	$14.57

Source: Accommodation Component of TDMS II

Data for 2014 is based on information received and entered into TDMS as of May 11, 2015

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 considered as preliminary/estimates. Site nights sold, site nights available and site revenue should be considered counts/totals for the sample (properties) reporting.

---

69 Karen Wolfrey (May 2015). A statistical table provided by Terra Nova National Park.

70 Government of Newfoundland Labrador (2015, May). *Central region performance indicators as of 11 May 2015.* Document provided by the NL Department of Business, Tourism, Culture and Rural Development.

Fixed Roof Accommodations

Key Findings

- Cottages and vacation rentals are the most prevalent type of fixed roofed accommodations (42% or 74 properties) in the Central region, followed by B&Bs (36% or 64 properties). Only 33 hotels/motels are found representing 19% of accommodation, and there are seven country inns (4%).
- A total of 1642 rooms are available; 54% are available from hotel/motel accommodators, 24% are cottages, vacation house rentals and hostels, 17% B&Bs, and 5% with inns;
- Most accommodations represent single entity businesses, with a few exceptions of operators with two or more properties, for example the Old Salt Box Company that currently has eight properties with plans to expand into other regions;
- The Central region is home to the internationally acclaimed Fogo Island Inn that, in a few short years, has become an award winning international icon and reached the stature of other celebrated properties such as BC's Wickininninsh Inn in Nimmo Bay. The Inn is a strong contributor to attracting international visitation, generating immense earned media, raising the profile of Fogo Island, and creating a motivator for guests visiting Twillingate to venture across the water to the island;

Photo: The Old Salt Box Aunt Christi's House in Greenspond
Credit: Adventure Central

- 79% of B&Bs carry a 3.5 to 4.5-star rating, compared to only 41% of the hotels; 16 of the 28 hotels/motels (57%) are 2.0 and 2.5-star rated, an area of expressed concern for a region trying to increase its competitive appeal;
- Room rates vary from a low of $35 - $55/night in all properties except the Inns, to an average of $350 - $400/night for hotels/motels, vacation cottage and house rentals, and B&Bs. The higher end price point for Inns is $219 per night, with the exception of the Fogo Island Inn at $2875 per night (including food for two) for their top end suites and 'room 29' which sells for a higher price point that varies by season. As of 2015, a minimum two nights reservation is required at the Fogo Island Inn.[71]
- The average daily rate (ADR) for all accommodations has increased annually from 2011 – 2014. It is important to note however that the ADRs for the region were impacted by the opening of the Fogo Island Inn in June 2013;
- B&Bs have the highest ADR at $165.88, followed by cottages/cabins and $142.61 and hotels at $109.08. Given the higher star ratings of B&Bs, they are in a position to command the higher price and attract a client with a willingness to pay significantly more for this type of accommodation;
- 57% of the 178 fixed-roofed accommodations are open year-round. This includes the majority of hotels/motels (88%), inns (86%), B&Bs (45%) and of cottages/vacation house rentals/hostels (50%) are open year-round. This implies the Central region is 'open for business year-round;
- Given the shift to online and digital communications, it was surprising to discover that 29% of all

[71] Fogo Island Inn (2015). *Rack card rates.* Retrieved from: http://www.fogoislandinn.ca/fii/wp-content/uploads/2013/03/Fogo-Island-Inn-Oct-2014_v20.pdf

accommodations do not have a website, 52% are without a TripAdvisor account and only 38% are on Facebook;

- Of all of the accommodations documented in Central Newfoundland only a few offer online reservations (28%), 78% are licensed, and 7% advertise that they are pet-friendly;
- While there are accommodation properties distributed throughout the Central region's large geographical area, the majority of properties (112 or 63%) are located in Lewisporte-Bonavista North-Terra Nova, the largest sub-region;
- At present, there is only one branded hotel in the region – an award winning Comfort Inn is in Gander. A new 61 room Red Roof Inn, operated by Pacrim Hospitality Services in Grand-Falls-Windsor will begin construction during the summer of 2015;[72]
- New accommodations are under construction. For example, in the town of Kings Point, owners of By the Sea Resort are constructing three high-end (4+star) luxury units overlooking the ocean and Canoe Hill Adventures is creating an accommodation by restoring a lighthouse on Exploits Island (a resettled community based in the middle of the Bay of Exploits in Notre Dame);
- Fixed roofed accommodation properties in the proposal stage include high end accommodations in Springdale (an area reported as being of interest to tour operators interviewed) and a 12-room high-end, 4.5-star property in Grand-Falls- Windsor;
- Regarding emerging/alternative accommodations there were no couch-surfing listings at the time of data collection, however, this is a growing accommodation sector and a moving target as awareness of this type of room offering and availability becomes increasingly popular. As well Airbnb reports 10 listings in the Central region ranging in price from $35 to $320 per night. Two of these properties are in Eastport, two are in Twillingate, and there is one in each of the communities of Salvage, Gambo, La Scie, Little Bay Islands, Change Islands and Indian Arm (near the Lewisporte Junction).

> "Unregulated accommodations across the province, like highly popular Airbnb, are jeopardizing the success of the province's tourism industry, according to Hospitality Newfoundland and Labrador. Online home-sharing service Airbnb connects travelers with hosts who will rent out their unused spaces to strangers for a nightly price. However, HNL Chair Rex Avery said using an unregistered business is risky for the renter and the host. "Airbnb is a business where it's unlicensed, they don't collect taxes, they don't pay taxes, they don't support the economy," Avery told *The St. John's Morning Show*.
>
> Source: CBC News Posted: May 04, 2015
> http://www.cbc.ca/news/canada/newfoundland-labrador/airbnb-a-risky-business-that-impacts-tourism-industry-hnl-1.3060373

- The arrival of Airbnb properties is of interest across the country given some are "unlicensed" entities which is not positive, on the other hand licensed B&B properties are finding this a new channel for listing their property; monitoring their growth and the impact on traditional accommodators will be important in the region;
- Of the 178 roofed accommodations[73], 146 are identified as being active in TDMS, therefore, leveraging the free marketing opportunities provided through the provincial tourism website and printed travel guide therefore 32 properties are listed as inactive or non-existent in TDMS;
- There is concern that as of April 2nd, 2015, 16% of the fixed roof accommodation properties (28) were not TAP approved and therefore, do not benefit from provincial marketing initiatives or other partnership/membership opportunities offered by HNL or the DMO's. However, the number of TAP approved properties will vary over time as properties can secure approval at any time by meeting minimal quality assurance standards and submitting an annual Tourism Operators Profile (TOP) form to TDMS.[74]

---

72 Edison, R. (2015, Apr 20). *New hotel chain coming to Grand Falls-Windsor.* Retrieved from: http://www.thetelegram.com/News/Local/2015-04-20/article-4118088/New-hotel-chain-coming-to-Grand-Falls-Windsor/1

73 The TDMS data pull for this study was done on 17 Nov 2014.

74 Government of Newfoundland & Labrador. (2015, Apr 2). *A list of non-tap compliant business in the Central region as of 2 April 2015.* A document provided by Linette Moores of the Department of Business, Tourism, Culture and Rural Development via email to support the project analysis.

Campgrounds & RV Parks

- A total of 33 campgrounds and RV parks were identified; 30 of these sites were identified as active in TDMS and three were inactive as of November 17, 2014[75]. To be identified as active as of December 31, 2014, all tourism operators must meet the TAP provincial minimum quality assurance standards and submit an annual TOP form to TDMS;
- Of the 33 sites, 73% of the capacity is for RV sites (24 locations), the remaining 27% are campgrounds (9 locations);
- Commercial campgrounds have seen their average daily rate drop from $15.78 in 2011 to $14.57 in 2014 (Table 30) but occupancy rates are up, as are the number of site nights available and the number of nights sold. Adventure Central hypothesizes that the difference may be related with the availability of annual site rentals, or a trend of youth who travelled with their parents in the 80s, now returning with their children to camp. The province does not have data to break out 'full-season' camping to differentiate it from 'overnight camping';
- Parks Canada reports a 16% increase in total camping nights from 2011 to 2014 at two Terra Nova National Park Camp Sites (Table 28); and
- Terra Nova National Park will see the introduction of 10 O'TENTik's[76] at Newman Sound to offer a new glamping option for visitors.

Photo: O'Tentik camping at Terra Nova National Park Credit: Parks Canada

- The operating season, depending on the campgrounds, begins mid-May, and the latest a campground stays open is mid-Oct. Within the Central region, Terra Nova National Park reports the longest operating season for their primitive campsites at their Newman Sound Campground (May to Thanksgiving);
- The majority of campgrounds and RV parks are located in the Lewisporte-Bonavista North-Terra Nova sub-region (55%, 18 operators).[77] The Buchans-Botwood-Notre Dame Bay sub-region has 24% of the capacity (eight locations) followed by the Baie Verte Peninsula and Green Bay sub-region (15%, five locations) and the Bay D'Espoir–Harbour Breton sub-region (6%, two locations).
- In terms of RV Park and Campground amenities, 26 of the 33 locations have showers (79%), 27

[75] The TDMS data pull for this study was done on 17 Nov 2014.

[76] http://www.pc.gc.ca/pn-np/nl/terranova/activ/camp/oTENTik.aspx

[77] Note the sub-region descriptions in TMDS (e.g. Buchans-Botwood-Notre Dame) in some occasions cross between DMO regions.

offer recreational activities (82%), 23 are located near a beach (70%), 29 are located near a park (88%), 20 have laundry facilities (61%), 19 advertise as being pet friendly (58%) and the majority are licensed for alcohol (91%);

- There are access limitations for non-resident visitors wanting to use campgrounds as there is a high level of advanced resident bookings within the region;
- Several RV Parks are popular with RV caravan groups including: Country Inn Trailer Park (Gander), Falls View Municipal Park (Bishop Falls), Square Pond Family and Friends RV Park (Glovertown), Sanger Memorial RV Park (Grand Falls – Windsor), George Huxter Memorial Park (Springdale) and Peytons Woods RV Park and Campground (Twillingate) when there is availability;
- Anecdotally, Adventure Central reports a visible increase in RV traffic; this is supported by Islander RV out of St. John's seeing significantly higher levels of RV rentals;
- Similar to the fixed roof accommodations, a high number of RV and campground operators do not have an online presence: 33% are without a website, none have a TripAdvisor account and only 33% are on Facebook, eight offer online reservations (36%);
- An issue was raised with unlicensed and unmanaged 'temporary' campsites in gravel pits throughout Central Newfoundland. There are some regulations in place, but by the time removal notices are given with 90 days to comply, the summer season is over. Off season, RVs are reported to frequent Walmart parking lots in Gander and Grand Falls-Windsor; and
- As of November 17, 2014 32% of the campgrounds (11) within the Central region were not TAP approved, this includes some of the most popular places, this is cause for concern.[78]

Implications/Considerations For All Accommodations

- B&B's offer a highly personalized and engaging visit for people who enjoy having a connection to small town personality, character and charm. The opportunity to engage with the owners to gain local knowledge, connections, recommendations, and referrals is invaluable for some, however, stakeholders report this value is often overlooked as customers make their accommodation arrangements, they may favour other types of roofed accommodations and may miss this local connection;
- The community host program[79]on Fogo Island, a program that pairs local community hosts with guests staying at the Inn, has been positive for the visitor experience as it provides opportunity for authentic, hands on-engagement with a local. This model has the potential to be considered by other smaller communities who wish to cultivate the talent of their local storytellers and guides. TAP issues related to this type of visitor experience will need to be addressed, a point that is raised in the People-Program section of this report;
- Within the Central region, the number of properties that advertise as being pet friendly is very low for Fixed Roofed Accommodations (7%), while 58% of campgrounds advertise as being pet friendly. This should be marketed as a differentiator for those offering this service and operators who do not offer it might consider relaxing the policy to attract more guests. In the event an operator is pet-friendly and has not added this to their TDMS profile, it would be good to do so;
- Examine why ADR is reduced at campsites in spite of an increase in demand;
- Training and coaching support is required to assist accommodators of all types who are not availing themselves to the basic online tools (website, TripAdvisor and Facebook). They must be encouraged to consider what their traveller needs are and the growing importance of having an online digital presence.

[78] Government of Newfoundland & Labrador. (2015, Apr 2). *A list of non-tap compliant business in the Central region as of 2 April 2015.* A document provided by Linette Moores of the Department of Business, Tourism, Culture and Rural Development via email to support the project analysis.

[79] The Community Host Program is designed to enhance the visitor experience through personalized access to local citizens who can welcome you to the community as a member of their family and take you around personally creating a real sense of connection and delivering on the Brand promise for authentic engagement with NLers.

CULTURE – HERITAGE BASED ASSETS

IB4.1: The destination has cultural and heritage tourism assets. [YES]

IB4.2: The destination has cultural and heritage tourism assets at a variety of price points. [NO]

Table 31: Number of Culture-Heritage Based Assets Destination

Type	# of Assets N = 86	Adult Price Range
Archaeological sites	7	Donations - $2.50
Art galleries and murals	16	Free, Donations - $6.00
Artists in residence program	6	No information available
Culture/heritage	55	Free, Donations - $7.00
Cultural experience	26	Free, Donations - $6.00
Eco-museum	0	--
Genealogy	3	Donations - $3.00
Lighthouses	5	$7.00- $10.00
Monument, memorials & plaques	18	Free, Donations - $6.00
Museums/cultural/historic attractions	70	Free, Donations - $20.00
National historic sites	1	$3.00
Outdoor theatre	1	Prices vary (Terra Nova National Park)
Provincial historic sites	1	$6.00

Note: Assets may appear in more than one category, depending on how they have self-identified in TDMS

Table 32: Provincial Historic Sites & Regional Museums 2011 – 2014[80]

Name of Site	2011	2012	2013	2014
Boyd's Cove Provincial Historic Site	8,905	8,817	8,144	6,690
Mary March Regional Museum	5,071	4,584	3,997	4,389
Logger's Life Regional Museum	2,753	2,947	2,399	1,825

Note 1: Boyd's Cove PHS was closed for part of the 2014 season (August 29th to October 5th) due to renovations and maintenance issues

Note 2: The operating season for Mary March Regional Museum is May to October

Note 3: The Loggers Museum closed as of the spring 2015 (http://www.cbc.ca/news/canada/newfoundland-labrador/sudden-closure-of-loggers-museum-leaves-workers-high-and-dry-1.3070521)

Key Findings

- There are 86 culture and heritage tourism assets within the region, of those 70 are identified as museum/cultural/historical attractions and 55 as cultural/heritage attractions (Table 31). These assets are spread throughout the region with the greatest concentration in the Lewisporte-Bonavista North Terra Nova sub-region;
- Six artist in residence programs provide the opportunity to connect, on a personal level, with local Newfoundlanders and like-minded visitors;
- The heritage assets cover a number of themes including logging, fishing, the railway, sealing, medical history, aboriginal history, mining, giant squid and polar bears, resettlement, air traffic and war connections, traditional life including carpentry, food prep, and gardening;
- A marine/whale theme is evident in the region, including the Whale Tour Network facilitating an opportunity to see up to 22 species of whales seasonally– this is a complement to the famed icebergs that the Central region is known for;
  - Pricing information could be found for 55 of the 86 sites (64%):
  - 21 accept donations (24%);
  - Eight offer free admission (9%);
  - Three offer family rates (4%);
  - None offer senior rates;
  - 12 offer children rates (14%);
  - 23 offer adult rates (27%);
- Conne River has a wide range of infrastructure assets with the potential to increase their programmatic, revenue generation options for guests;
- Of note was the fact that 21 of the heritage assets are open year round (24%), another 14 at least six months of the year (16%) which raises an opportunity to extend seasonality by offering activities/experiences in the off-season;
- Of the 86 culture/heritage assets, 81% have a website, 48% could be located on TripAdvisor, and 34% on Facebook;
- The closure of the Logger's Life Museum, and partial closures / decreased operational times for Boyd's Cove Provincial Historic Site and the Mary March Museum, resulted in less access to these assets (Table 32); and
- While 70 (81%) of the culture/heritage operators have a website, only 13 of these post pictures

[80] Government of Newfoundland Labrador (2015, May). *Central region performance indicators as of 11 May 2015.* Document provided by the NL Department of Business, Tourism, Culture and Rural Development.

of guests engaged in visitor experiences, three have a video, 10 a call to action, four online reservations, 21 accept credit cards and two offer a link to a TripAdvisor account. TripAdvisor is equally weak as only 41 of the assets (48%) having an account, and of them, none responded to visitor reviews at the time of data collection. A similar picture emerges with Facebook; 29 (34%) have a Facebook account and the level of engagement is low.

Implications/Considerations

- The cultural and heritage assets found in the region are an integral part of its attractiveness and appeal. The declining visitation at the Provincial and Regional facilities is a concern and is attributed to reduced staffing due to the lack of funding and reduced operating hours, these were raised as issues at the stakeholder sessions;
- The ability to better leverage existing assets and increase visitor appeal will require an operator mind-shift, one that shifts from only presenting culture and heritage products to identifying ways to stage and engage visitors in unique tourism experiences through enhanced programming for which a base fee or higher fee can be charged;
- Each culture/heritage asset should reassess how providing special places for free or by donation will impact their on-going sustainability. While some of the assets have a craft shop attached to them, or as part of their operation, these sites need to look to raising value through program activities for which visitors are willing to pay a fee. This not only will enhance the visitor experience; it will provide a much needed revenue source;

Photo: Beothuk Interpretation Center Provincial Historic Site in Boyds Cove
Source: Newfoundland Labrador Provincial Historic Sites

- The reality of having limited resources makes it extremely difficult to have a strong web-presence, yet without it, these special places may never make the consideration set of guests who do not know there is a reason to visit, choose to detour to a community, and be there when the site is open. Efforts need to be made to strengthen the website presence and at a minimum look into the merit of a TripAdvisor site or another distribution channel to attempt to get user-generated content working on the behalf of the sites;
- Several themes for connecting the culture and heritage of multiple coastal communities through Central Newfoundland emerged. These themes tie into the tourism recreational boating opportunities and tie to Central NL's history of early settlers accessing the region from the North and South. Themes included:
  - Isolated and resettled communities;
  - The marine highway of coastal communities;
  - Lighthouse journeys by land and sea; and
  - Archeology is everywhere.
- Sustainability requires a shared responsibility of collaboration between federal, provincial and municipal governments; however, not-for-profit organizations must proactively develop their own sustainability strategies by undertaking a critical review of their current operations. This includes identifying options for on-site programming (that charges a fee above the cost of general admission) and creative uses of technology to enhance promotion.

NATURE BASED ASSETS

IB5: The destination has nature-based assets [YES] at a variety of price points. [NO]

Table 33: Number of Nature Based Assets in the Destination

Type	# of Sites / Properties N=46	Price Range
Beaches	9	Free, donations - $5.80
Ecological Reserves	3	Free, donations
Gardens/Community Parks	15	Free, donations - $0.50
Geology and / Fossils	1	Donation
Lookout / Viewing Point	23	Free, donation to $10.00
National Parks	1	$5.80
Natural Attractions	19	Free, donation - $6.50
Provincial Parks	3	$5.00
Wildlife Reserve	1	Free

Note: A single location can have more than one asset. For example, a lookout area may also have a beach and fossils.

Key Findings

- There are 46 nature based assets identified, the most prevalent being lookouts and viewing points (23), followed by natural attractions (19), and gardens/community parks (15) and nine main beaches (Table 33);
- 37% of these assets are available year-round, 54% in high season and 9% operate at least six months;
- Three provincial parks, one wilderness reserve and Canada's most eastern National Park – Terra Nova – contribute to the region as these designated assets are part of a larger system for preservation, presentation and enjoyment;
- The majority are free, invite a donation, or charge nominal fees of $0.50 to $10.00;
- 72% of the assets have a website, 20% have a TripAdvisor presence, and 9% are on Facebook; and
- The high focus on icebergs, whales and snowmobiling in the region means that many of these natural treasures could be used as stages for specialty programming, visitor engagement or a connected set of reasons to 'get off the beaten track'.

Implications/Considerations

- Nature based assets are a core element of the "Adventure Central" brand. Since most provide free/nominal fees to access, understanding ways to use these assets to drive further economic impact is important, consideration should be given to:
- Creatively package "free" with paid assets like accommodations, culinary experiences, interpretive programs and use of guides and outfitters to develop new market-ready, high quality visitor experience packages, this is one way to achieve higher financial returns;
- Promoting geocaching (physical and virtual) to explore the area will attract niche markets; and
- Consider adding the use of QR codes or other interpretation techniques to bring the stories of the nature based assets to life.
- Adventure Central confirmed that a discussion regarding public washroom access has been

underway, albeit not a formal part of the data collection. It is an important part of enjoying nature based activities that needs to be considered in future developments and enhancements;

- Staff and volunteers should be encouraged to continually examine ways to enhance the visitor experience beyond self discovery (non-revenue generation) and determining if there could be a wider range of ways a visitor can engage with nature based assets, thus creating a greater sense of place through higher engagement and interaction with guests; this supports charging higher admission rates or fees for a program.
- Towns, communities and operators are often responsible for promoting nature-based assets and should include a map of how to get there, information about each asset, what to bring, how long to plan for, amenities, etc. The more appealing, the more likely a visitor is to come, enjoy, stay, and revisit. As well, ensuring someone takes the lead on ensuring their online presence is managed could benefit many.

Photo: Scenic View from hiking trail in Leading Tickles

Trails and Routes

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

IB6.2 The destination has a variety of activity-based trails through the region to engage guests. [YES]

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

Table 34: Trails and Routes within the TDVAA Research Framework

Type	# Routes (N=133)
Themed driving routes with interpretation	0
Themed driving routes with signage	8
Walking/hiking with interpretation	38
Walking/hiking with signage	101
City/town based heritage interpretive trails	19
ATV trails	14
Back country hikes	11
Berry picking	52
Coastal trails	45
Hiking and walking trails	115
Scenic touring	77
Self - Driving vacations	8
Swimming	27
Mountain biking	44
Town and country treks	39
Trails in national and provincial parks	16
Snowmobile trails	15

Note: A single location can have more than one asset. For example a hiking and walking trail may also be a part of a coastal hiking trail.

Table 35: Trails and Routes Variables Added by Adventure Central not in TDMS

Type	# Routes (N=133)
Main recreational route with signage *(new variable)*	8
Camping opportunities (designated) *(new variable)*	13
Option to ice skate in winter *(new variable)*	13
Option to cross country ski *(new variable)*	36
Playground *(new variable)*	9
Campfire facilities *(new variable)*	30
Boardwalk *(new variable)*	66
Natural tread *(new variable)*	113
Stairs *(new variable)*	25

Note 1: A single location can have more than one asset.
Note 2: A main recreation route with signage was defined as a backcountry route that is 50+km in length with directional signage and accessible by recreational machine

Key Findings

- There are 133 trail and route assets identified (Table 34) in the Central region;
- 38 have walking/hiking with interpretation (28%) and 101 have signage (76%). They range in length from 0.15 km to 48 km (Outport Trail in Terra Nova National Park) and are marketed as being 'second to none' due to numerous views, lookouts and well built and maintained trail structures.
- 19 are City/Town Based Heritage Interpretive Trails. These trails range in length from 0.5 km to 16 km (The Old Trails in Eastport) and connect traveller to the communities past and present;
- 14 trails are for ATVs, 15 for snowmobiles, 39 country and city treks, and 77 for scenic touring;
- There are no Themed Driving Routes with interpretation, however, there are eight themed driving routes with signage; and
- The Themed Driving Routes range in length from the Kittiwake Coast – Road to the Beaches Route (43 km) to the Exploits Valley Route (534 km).
- 64 of the Walking/Hiking Trails (56% of total) are located in the Lewisporte-Bonavista North-Terra Nova sub-region, followed by 21 trails (18%) in the Baie Verte Peninsula and Green Bay sub-region, 20 trails (17%) in Bay D'Espoir-Harbour Breton, and 10 trails (9%) in the Buchans-Botwood-Notre Dame Bay area;
- Several trails are multi-use for activities such as mountain biking, cross country skiing, snowmobiling, and ATVing. The T'Rail way runs through multiple communities within the Central region and provides access via recreational vehicle.
- ACN reports that all of the main recreation routes are accessible by ATV and snowmobile, six of the Walking/Hiking Trails are accessible by ATV and seven are accessible by snowmobile.
- The most popular areas of the Province visited by non-residents participating in trail hiking include the St. John's, Gros Morne, Gander/Twillingate/east to Terra Nova and the Clarenville/Bonavista Peninsula area[81];
- Relative to the safety of guests, it was mentioned by a stakeholder that there are no provincial standards per se beyond 'is it safe', as a result the onus falls to the operator who takes guests

[81] Government of Newfoundland and Labrador, Tourism Research Division. Department of Tourism Culture and Recreation. *2011 Exit Survey – Profile of Non-resident Trail Hikers.*

out and on the trails;

- As reported in the Western region TDVAA, and *equally relevant to the Central region*:
- BTCRD is spearheading a “cluster based” approach for trail development throughout the province; this approach 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, extend visitation in an area and drive economic impact;
- The Atlantic Canada Trail Association has produced an Assessment Trail User Guide, the contents of which details the specific requirements for trail development and maintenance; those involved in trail development should (if they have not already) avail themselves to this helpful tool and determine “trail readiness” within the Central region; and
- By aggregating the TDVAA trail development findings in the Eastern, Western, Labrador, Central and the North East Avalon regions, a stronger visitor experience will be created that invites and entices people to move around the province based on specific attributes.
- Adventure Central reports there are four new trail enhancement projects in development with BTCRD:
- Twillingate Trail Network
- Fogo Island Trail Network
- Eastport Trail Network
- Exploits Valley Area Snowmobile trail network

- The goal of each network is to attract visitors from away, as the majority of the funding will be for trail enhancements that will connect trails, allow for safe access and provide quality information for visitors with the details they need to enjoy the trails (maps, signs, text/images and online tools). When market- ready, these projects will be showcased by the region and province as organized trail networks for Central. Each new trail:
    - Has a committee working with different communities/ municipalities, as well as funding partners, different government officials and not for profit groups such as Adventure Central.
    - Is identifying pre-existing trails that link tourism assets into networks that enhance visitor appeal, and will be developing and maintaining these networks to fit into the provincial cluster scheme.
    - Is working closely with consultants to assess the method and cost of developing these networks.

- Many trails are not TAP approved within the Central region[82] and some were identified by Adventure Central as not being in TDMS;
- Few charge for use of the trails albeit they attract visitors to the area who may spend money in the local community;
- This was a limitation to trail maintenance and management identified by different operators in the stakeholder sessions;
- Provincially, non-resident travel parties participating in trail hiking as a trip activity report an average in-province *per party* expenditure of $2,213 and an average in-province *per person* expenditure of $1,102 per trip. On a per person per nightly basis, travel parties participating in trail hiking reported an average in province expenditure of $120[83]; and
- Compared to all provincial non-resident travel parties, parties participating in trail hiking reported higher than average in-province per party and per person expenditures. Specifically, per party and per person expenditures are 26% and 15% higher than the overall average[84]

Implications/Considerations

---

[82] Government of Newfoundland & Labrador. (2015, Apr 2). *A list of non-tap compliant business in the Central region as of 2 April 2015.* A document provided by Linette Moores of the Department of Business, Tourism, Culture and Rural Development via email to support the project analysis.

[83] Government of Newfoundland and Labrador, Tourism Research Division. Department of Tourism Culture and Recreation. *2011 Exit Survey – Profile of Non-resident Trail Hikers.*

[84] Ibid

- The Central region's phenomenal coastal walks, large variety of trail types, viewpoints for iceberg and whale watching, scenic pathways, and recreational routes are a truly distinctive feature and one that should be optimized to draw in travellers for which these types of assets are appealing;
- The region is already optimizing the year-round potential of the trails with summer and winter activities. As trails are an indirect revenue generator, efforts to increase the social media buzz regarding the trails should be pursued through blogs, photo contests, Facebook, Instagram and other places where user generated content can help tell the stories and diversity of the trails to other people who use them – be that hikers, cross-country skiers, ATV'ers or snowmobilers. These groups often have websites and blogs 'within their circle' and these should be identified and optimized. It is important here to ensure the all-season stories and visitor opportunities are communicated – merely listing a trail, its length, and its use will not be enough to differentiate or drive visitation;
- Currently, snowmobilers using designated trails require a trail pass. Summer activities, such as ATVing, dirt bikes, and side by sides, do not require passes and therefore, do not pay fees.
- The province and municipalities should consider a tariff system for trails for high-use groups to ensure they are maintained and investment in the visitor experience is made in order to attract more guests;
- Investigate additional ways to package the trails with other events, reasons to stop and stay, and to round out an experience;
- In the Grand Falls – Windsor area, work is being done on a new project to develop an extensive mountain bike area associated with the cross-country ski club and a resort. Terra Nova National Park and according to Adventure Central, Dildo Run Provincial Park is also looking to develop mountain bike trails. As well, annual mountain bike events already occur in the region in Grand Falls-Windsor area and there is the potential to grow this niche market; and
- Ensuring trail development activities address the importance of having appropriate signage (trail heads, to interpretation), washrooms, information on aspects such as weather and wildlife, along with and maps will be important.

RECREATIONAL AND MAN-MADE ATTRACTIONS

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

Table 36: Recreational & Man-Made Attractions in the Destination

Assets	Number	Price Range
Total Number of man-made attractions	21	Free - $30.00
Animal farm	3	1 farm is free, no pricing listed for others
Aquarium	2	Pricing not provided
Driving range	0	-
Family amusement park	4	Pricing not provided
Golf courses	4	$45 – 60 peak season
Mini-golf	2	Pricing not provided
Paintball	0	-
Science Centre	3	$6.50- $25.00
Ski Hills	0	-
Cross Country Ski Clubs	2	$2.00 - $79.00
Spa	4	Varies, based on services

Note 1: Some businesses have assets that fit into more than one category.
Note 2: Community recreation centres, pools and arenas were not reviewed as part of this study.
Note 3: Marinas are reported in the transportation section.
Note 4: The value of competitive recreational sports facilities was identified by Adventure Central as being an important tourism driver to their region. The variable is beyond the scope of this study and ability to compare with other regions so it has not been included, but a TMDS update may wish to consider this.

Key Findings

- There are very few man-made assets in the Central region and of those that exist, they cater primarily to the local market and would not be considered a major tourism draw (Table 36);
- The Salmonid Interpretation Center in Grand Falls-Windsor, the Splash & Putt in Traytown and the Visitor Centre at Terra Nova National Park were identified as having critical acclaim;
- 52% of the man-made attractions have a website, 32% a TripAdvisor page and 67% a Facebook page; and
- There are eight facilities, identified as competitive sport recreation sites, associated with tourism by Adventure Central: the Joe Byrne Memorial Stadium, the Windsor Stadium and the Centennial Field in Grand Falls – Windsor, the Gander Field Complex and the Stadium / Community Center in Gander, the Springdale Stadium in Springdale, the Lewisporte Stadium in Lewisporte, and the Glovertown Arena in Glovertown.

Implications/Considerations

- Given limited resources to invest in tourism development, further development into man-made attractions is not warranted, with the exception of the Change Island Pony Refuge as identified as a project in the pipeline, which represents a unique NL story in a location growing in popularity due to its proximity to Fogo Island and Twillingate.

SHOPPING & RETAIL

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

Table 37: Shopping Businesses in the Destination

Shopping	# Of Properties N=39	% Open Year Round	% 6 month + operation	% high season only
Art or Craft *Studios*	15	56%	10%	33%
Antique Shop/Dealer	1			
Craft Shops	31			
Commercial Art Galleries	19			

Note 1: Properties can identify themselves in more than one shop category in TMDS and not all businesses in the region have elected to list on TDMS. And due to rounding off, the percentages in columns 3 to 5 add up to 99%.

Key Findings

- There are 39 local shopping and retail businesses in the Central region, the majority of which are craft shops (Table 37). Of these, award winning Kings Point Pottery is noted to have international acclaim, representing over 200 artists – primarily NL and Atlantic Canada artists but also seasoned and novice talent from across the country;
- There are 19 commercial art galleries in the Central region with a diverse array of products, examples include:
- The House of Diamonds Arts Centre in Glovertown
- JAS Silks Studio in Norris Arm
- King's Point Pottery in King's Point
- The regional product diversity includes: knitting, weaving, pottery, candles, photography, glass, metal, jewelry, furniture, rug hooking, folk art, paintings, pelts, antlers, and fishing flies;
- 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 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 the provincial tourism website;
- The most popular areas of the province visited by non-residents visiting a craft/gift shop include St. John's, Gros Morne, Gander/Twillingate East to Terra Nova and the Bonavista Peninsula[85]; and
- The majority of the stores are open year-round (56%) with 10% open six months of the year.

Implications/Considerations

- Purchasing local arts and crafts is important to visitors, therefore, it is important to support existing retailers, especially those providing unique retail experiences;
- Artisans are encouraged to develop learning based experiences within their studios, galleries and shops, these hands on experiences can be sold to visitors representing a potential new revenue source for retailers. BTCRD, supported by Adventure Central, could provide experience coaching for operators with the greatest potential to raise the bar on the visitor

[85] Government of Newfoundland and Labrador Tourism Research Division. (2011). *2011 Exit survey profile of non-residents visiting. The province's craft/gift shops.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit_Survey_Craft_and_Gift_Shopping.pdf

experience and create new products for market;

- Encourage on a regional basis initiatives such as developing an artisan experience category that asks artists to create new visitor opportunities that are aligned with TAP, the quality standards of the Craft Council of NL and the Crafts of Character Certification[86];
- The Craft Council of NL 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 may present a problem for some given the large geographical distances from the Central region. It is suggested that the Council explore ways to take the jury "on the road" to allow more artists to become accredited;
- Fostering a closer relationship between the Craft Council, the NL Arts Council, Adventure Central and BTCRD could lead to opportunities for new experience development that would benefit the visitor as well as the artisan. Examples such as "Secrets of the Masters" could become a series that invites visitors to engage with the diverse range of artists from potters to silk fabric artists and painters, to name a few; and
- The majority of the stores are open year-round; and when you add in the six month operations, roughly two-thirds of the stores are open to the travelling public for most of the year. Ensuring this is well communicated as part of the off season tourism information is important. Using the arts and crafts stores as the focal point for Christmas sales events, perhaps packaged with another event in the area, could present opportunities in some communities.

[86] http:www.craftcouncil.nl.ca

Culinary, Food and Beverage

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

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

IB9.3 The destination offers other culinary themed establishments that purposely attract visitors. [NO]. *(Exception: Auk Island Winery)*

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	187	86%	10%	4%	7	1	-
Casual Dining	150						
Catering	2						
Fine Dining	4						
Fast-Food	50						
Coffee Shops	23						
Bakeries	9						
Pubs/Bars [2]	7						

Note 1: Some food and beverage businesses fit more than one category.

Note 2: ACN confirms there are more pubs in the region, they just aren't within the e-dining database. It was beyond the scope of the project to spend time identifying all in the region not in the RANL database.

Growlers Ice Cream Photo Credit: Newfoundland Labrador Tourism

Table 39: Specialized Food and Beverage Options in the Destination

Food and Beverage Options	Number	Percentage
Vegetarian	84	45%
Vegan	9	5%
Gluten Free	16	9%
Heart Healthy (e.g. low sodium, low fat, whole grain)	22	12%
Local foods (from the region)	35	19%
Local Newfoundland & Labrador recipes	102	55%
Local beverages (wine, beer, ciders)	58	31%
Ethnic food (Chinese, Greek, Italian, etc.)	20	11%
Child menus	124	66%
Senior menus	3	2%

Table 40: Culinary Themed Establishments in the Destination

Culinary	# of Properties	% Year Round	% 6 month + operation	% high season only	# with Hands-on Experiences
Wineries	1	100%	0%	0%	100%
Breweries	0	-	-	-	-
U-Pick	5	0%	33%	66%	100%
Root Cellar	0	-	-	-	-
Farmers Markets	9	0%	20%	80%	80%
Farms/Organic Farms	2	0%	0%	100%	100%
Other (Barbour Living Heritage Village)	1	0%	100%	0%	100%

Key Findings

- There are 187 food and beverage establishments in Central (Table 38); two with provincial acclaim (Nicole's Café in Joe Batt's Arm and Bistro on Roe in Gander), one with national acclaim (Outport Museum and Tea Room in La Scie) and in 2014 the Fogo Island Inn was voted one of the Best New Restaurants in Canada by Air Canada's Enroute magazine[87];
- 86% are open year-round, 10% are open at least six months of the year, and 4% are open only during high season (June – September);
- 80% of the food and beverage operators offer casual dining, 27% identify themselves as offering fast food, 12% as coffee shops, 5% as bakeries, 2% as fine dining and 1% as

[87] http://enroute.aircanada.com/canadas-best-new-restaurants-2013/fogo-island-inn/
https://www.youtube.com/watch?t=100&v=SoR67CKFa-c

catering.

- Only seven pubs/lounges (5%) were listed in the TDMS, which according to the Adventure Central team does not represent the full offer as some do not see the value in being a RANL member;
- One food and beverage establishment (Fogo Island Inn) advertises as having an accredited chef, which is not surprising as only four establishments are fine dining establishments;
- 102 establishments serve local NL recipes (55%), 58 local beverages (31%) and 35 serve foods from the local region (19%), all of which has high appeal among non-resident travellers (Table 39);
- Vegetarians are serviced by 84 of the 187 establishments (45%). This was consistently noted as 'not likely' in the stakeholder validation meetings, nine establishments declared vegan options (5%);
- Heart healthy options are offered by 22 establishments (12%), ethnic food by 21 (11%), and gluten free by 16 (9%);
- Children's menus are provided by 124 establishments (66%), seniors portion by only three (2%);
- 16 culinary attractions were identified (Table 40) as farmers' markets, u-picks, and organic farms;
- Auk Island is the only winery in the region offering wine tasting, tours, activities, and even berry wine flavoured ice-cream. Their berry / Newfoundland humour theme is incorporated in everything they do including their marketing materials, products, and even the paint colour on their building;
- Some of the regional fish plants provide a unique seafood culinary attraction; the traveler often gets to speak to the fisherman and may be able to have the seafood prepared for them onsite;
- One of the 18 culinary attractions are open year round, 12 during high season only, and two are open six-months of the year.
- While no root cellar culinary experiences were identified in the data collection, Twillingate was reported as having 232 by CBC [88] and Crystal Bray from Memorial University[89] reported 45 in the first week of her research into this interesting feature.
- Issues that surfaced during the data collection and stakeholder consultations included:
- Sometimes the name of the hotel property was listed in the TDMS database and hence advertised on the provincial website, but not the actual name of the restaurant, this could be problematic for people who are looking for the actual restaurant, regardless of its accommodation affiliation;
- Cooks are not comfortable making meals they are not familiar with. As one stakeholder shared "Consumers/producers know what fish and chips looks like, but we don't know what a fish taco looks like. If we don't know what it looks like, most won't cook it."
- The lack of seafood on menus (e.g. crab and lobster) emerged and was linked to regulatory issues in getting food directly from the fish plant to the table. This however was changed in Sept 2015 "People and restaurants in Newfoundland and Labrador will now be able to purchase local seafood as the government makes legislative changes to allow for the sale of fish directly from wharves.[90]
- Locals enjoy larger meals, while visitors find the portions too large.

Implications/Considerations

- There is an opportunity for restaurateurs to consider a redesign of their menus to highlight elements important to a growing number of visitors and locals alike:

---

[88] http://www.cbc.ca/news/canada/newfoundland-labrador/the-root-cellars-of-twillingate-a-personal-passion-for-local-history-1.3061508

[89] Braye, C. (2013). *Exploring our roots: A heritage inventory of Newfoundland's root cellars.* Retrieved from: http://www.mun.ca/ich/Occasional_Paper_03_1.pdf

[90] http://www.cbc.ca/news/canada/newfoundland-labrador/n-l-relaxes-regulations-on-local-fish-purchases-1.3248682

- A Healthy Options section would allow the clustering of vegetarian, vegan, gluten free, heart healthy, and low calorie items together thus giving ‘critical mass’ as found with the appetizers, main courses and desserts. As the baby boomer generation will represent a significant percentage of the local and travelling populations in the years ahead, providing these options allows diversity and choice and be offered on a limited basis at first to gauge demand;
- Operators should consider adding a seniors portion or ‘smaller appetites’ option to the menu for those wanting smaller portions;
- Untapped opportunities, such as the presence of root cellars, represents an opportunity for an entrepreneur to put together a tour, partnered with a culinary attraction and restaurant;
- Creating a collaborative marketing campaign to draw attention to the themed culinary establishments would help visitors uncover these special places that create fascinating travel diversions and an opportunity to connect with locals, purchase their products, and discover some of NL’s traditions.
- As the collaboration between RANL and BTCRD advances to bring the food and beverage businesses into TDMS, small details should be noted. For example, having applicants enter the name of their restaurant (rather the name of their hotel) as this is important to travellers who may be seeking a place to dine, and do not connect it with a hotel property. This is also what guests would find on TripAdvisor (e.g. Georgies Restaurant in Twillingate vs. the Anchor Inn);
- Operators have the opportunity to examine their menu and see where there are opportunities to diversify, be that seasonally or offering a ‘feature of the week’. Given the lack of fine dining in the region, this too represents an opportunity for an entrepreneur to reach the growing culinary travel market.
- Consideration should be given to creating a culinary hub, for example in Twillingate/Fogo/ Lewisporte, one that can strategically grow the region’s reputation for F&B diversity and choice, as has been occurring in the Western region communities of Rocky Harbour, Neddies Harbour and Woody Point.

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 Central Region

<table>
<tr><th colspan="2">Conference/ Convention /Meeting Space</th><th>Hotels/ Resorts</th><th>Retreat Centres</th><th>University /Colleges</th></tr>
<tr><td>Number of venues</td><td>78</td><td colspan="3" rowspan="9">This level of detail not available</td></tr>
<tr><td>Person capacity (Total theatre seating)</td><td>Range: 12 to 1250</td></tr>
<tr><td>Person capacity (Ballroom rounds/seating)</td><td>Range: 25 - 500</td></tr>
<tr><td>Trade show or exhibit space (square footage)</td><td>Range: 1400 – 17,000 sq. ft.
(at 4 properties)</td></tr>
<tr><td>Plenary space and break out rooms</td><td>10 rooms</td></tr>
<tr><td>Onsite catering</td><td>38 properties (49%)</td></tr>
<tr><td>Onsite AV equipment/support</td><td>14 properties (18%)</td></tr>
<tr><td>Sufficient overnight accommodation</td><td>19 properties (24%)</td></tr>
<tr><td>Open year-round</td><td>62 properties (79%)</td></tr>
</table>

Note: All of the information presented in this table was gathered by the data collection team as TDMS does not currently track conference/convention/meeting space venues.

Key Findings

- 78 venues exist in 27 communities; Grand Falls - Windsor reports the largest number of venues at 15, followed by Gander with 10. The remaining 25 communities have between one and four venues each. There are substantially more venues in the Central region than in the Eastern region (24), Western region (29) and Labrador region (12);
- The Buchans-Botwood-Notre Dame Bay sub-region has the most Conference / Convention / Trade Show venues with 27, followed by Lewisporte-Bonavista North-Terra Nova sub-region with 22 venues, nine venues in the Baie Verte Peninsula and Green Bay and four in the Bay D'Espoir-Harbour Breton sub-region;
- The majority of venues (79%) are open year-round with 49% providing on-site catering;
- Onsite AV equipment and support is available at 24% of the venues which places the responsibility on the client to ensure their self-sufficiency for their meeting/event;
- Theatre seating capacity of the venues identified in the Central region ranges from 12 - 45 guests in 22 of the smaller venues, 50 – 100 guests in 30 venues and 108 – 400 guests in 16 venues. The six largest venues are the Gander Hotel (600), Lewisporte Stadium (1000), Windsor Stadium (1050), Gander Community Center (1100), T.A. Soper Memorial Stadium (1200), and the Joe Byrne Memorial Stadium in Grand Falls-Windsor (1250). The larger stadiums are used as trade show venues as well;
- Of the 78 venues, 68 of the venues (87%) do not have breakout space available, 10 facilities do (13%);
- 24% have sufficient overnight accommodations to cater to all meeting/conference guests, 56%

had accommodations near-by; and

- 71% of these assets have a website.

Implications/Considerations

- As the Central region currently has the largest meeting capacity outside of St. Johns, there is surprisingly little information on the municipal websites and individual business websites for meeting and event planners. Given this key line of business, there is an opportunity for GFW economic development to aid the Centre in promoting their capacity and drive business to the community.
  - For the larger hotels/venues, there is an opportunity for all sites to enhance their booking information with an enriched landing page, a PDF of all event information (room size and configuration, floor plan, table size/shape/linen options, AV equipment available onsite, breakout space, hospitality suite, parking, photos of the space), and an online booking request form. In some instances, (e.g. Town of Grand Falls-Windsor) it does exist but could be easier to find for this is vital information to event planners.
  - Incorporating a booking calendar that highlights when the facilities are not available due to existing events could benefit travel planners looking for venue space;
  - For smaller venues, ensuring the essential planning information is readily available, including community resources (e.g. projector, flip chart, screen, etc.) should be promoted on a landing page;
  - As the majority of the venues have more meeting space than rooms to accommodate guests, they should provide links to other properties that can accommodate the guests, and provide walking/driving times to and from the venue so this is known to the planners at the time of planning their events.

Activity-Based Tourism Businesses

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. [ALMOST]

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

Table 42: Activity-Based Tourism Businesses in the Destination

Activity Based Companies	# Of Visitor Opportunities	Seasonality *(Based on the company's operating season of those who offer the activity)*		
		% Year Round	**% 6 month + operation**	**% High season only**
Total Number of Companies	**26**	**31%**	**14%**	**55%**
Angling	11	0%	0%	100%
ATV tours and/or rentals	2	0%	50%	50%
Biking	1	0%	100%	0%
Bird watching	5	20%	20%	60%
Bird watching boat tours	10	0%	20%	80%
Canoeing	6	0%	60%	40%
Diving and snorkeling	1	0%	0%	100%
Airplane sightseeing	2	100%	0%	0%
General sightseeing	7	14%	14%	72%
Group sightseeing	7	29%	0%	71%
Hiking and walking	6	0%	0%	100%
Iceberg watching	9	0%	0%	100%
Iceberg watching – boat tour	9	0%	0%	100%
Nature and wilderness	15	27%	27%	46%
Photography	7	14%	0%	86%
Rafting	1	0%	0%	100%
Recreational fishing boat tour	7	0%	14%	86%

Sea kayaking	6	0%	0%	100%
Snowmobiling	7	0%	0%	100%
Snowshoeing	2	0%	0%	100%
Tour package	3	33%	67%	0%
Whale watching	2	0%	0%	100%
Whale watching boat tour	10	0%	0%	100%
Winter	7	0%	0%	100%

Note 1: Not all activities offered in the Central region fit into the categories captured in the TDVAA (E.g.: Little River Waterpark Tours that offers seadoo rentals and tubing).

Note 2: Activities not present in Central include caving, climbing, cross country skiing tours, dog sledding, downhill skiing & snowboarding, horseback riding and horseback riding tours, ice climbing, kite skiing, rock climbing, step on guide, tour planning, winter caving and zip lining. Some percentages for seasonality were adjusted when a company offers multiple experience and some are year round while other are high season only (i.e. angling and snowmobiling).

Note 3: Determining the exact seasonality of every product, with every company was beyond the scope of the study. Rather, the seasonality percentages represent when the companies offering the activity operate.

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	8%	Prices not provided
2 – 3 hour programs	13	50%	$25 - $80
Half day programs	12	46%	$45- $300
Full day activities	12	46%	$75 - $600
2 – 3 day excursions	4	8%	$300-$500
4 – 7 day excursions	1	4%	$1,895
8 – 10 day excursions	1	4%	$1,395 - $1,695
11 – 14 day excursions	0	0%	-
Program Dynamics			
Single site-based activity	7	27%	
Multi-destination based activity	19	73%	
Guided	26	100%	
Self-discovery	8	31%	
Experience Dynamics (Answered to the best of the data collectors' ability)			
Educational	19	73%	
Physical	16	62%	
Social	11	42%	
Spiritual[1]	-	-	
Connects you to the place	22	85%	
Connects you to the people	11	42%	
Connects you to the culture	18	69%	
Engages the senses	20	77%	
Interactive/hands-on engagement	20	77%	
Unique to Newfoundland & Labrador	23	88%	
Behind-the-scenes experience	2	8%	
Skill			
No skill required (e.g. never kayaked)	22	85%	
Some skill required (e.g. paddled a few times, know a bit about kayaking)	16	62%	
Extensive skill required (e.g. experienced kayaker capable of paddling in all sea conditions and for extended periods of time).	4	15%	

[1] This variable was not rated in the Central region for the data collection team identified they could not find sufficient evidence to warrant an option.

Table 44 Activity-based Companies Sales Channels

Availability			
Sell direct to travellers	26	100%	
Packaged independent travel options	6	19%	
Group travel options	4	15%	

Key Findings

- There are 26 activity-based companies offering activity-based tourism opportunities (Table 42), six operate year round (23%), 16 (62%) operate in high season only (Jun to Sept) and four operate at least six months of the year (15%);
- The most prevalent type of activities offered by the companies includes:
- Nature and wilderness tours (58%),
- Angling (42%),
- Whale watching (10%); and
- Bird watching boat tours (38%), and
- Iceberg watching boat tours (34%).
- A number of unique visitor opportunities exist in the Central region, but they are offered by only one or two companies: ATV tours, sightseeing, diving/snorkeling and biking;
- Four of the activity-based companies are considered to be primary demand generators for the region: Rob Clark Motorsports in Springdale, Rafting Newfoundland in Grand Falls - Windsor, Riverfront Chalets Snowmobile Tours in Grand Falls - Windsor, and Victoria Outfitters and Tours on the Victoria River;
- Two of NL's eight CTC Canadian Signature Experiences are located in the Central region:
- An Icy Cruise into Nature – Twillingate Island Boat Tours Ltd in Twillingate, and
- The Iceberg Quest – Iceberg Quest Ocean Tours in Twillingate; and
- These companies also have been identified as two of the four operators with national acclaim, along with Iceberg Man Tours and OQ Close Encounters.
- Three operators are noted for their provincial acclaim (Iceberg Quest Ocean Tours in Twillingate, Captain Dave's Fishing and personalized tours in Twillingate, and Coastal Connections in Terra Nova National Park) and two for international acclaim (Rafting Newfoundland in Grand Falls – Windsor and Riverfront Chalets Snowmobile Tours in Grand Falls – Windsor). Additionally in Sept 2015, "Prime Berth in Twillingate has been honoured by being named number six in the top 10 museums in Canada" by TripAdvisor as being one of the top 10 museums in Canada[91];
- Two to three hour tours are offered by 50% of the companies, followed by half-day programs (46%) and full-day activities (46%). This is beneficial for accommodators and restaurateurs who can package with these activities to increase the length of stay, spend and the overall experience in the community;
- The range of price points ensures guests with varying degrees of 'willingness to pay' have options from half day tours available at $45 - $300, to $75 - $600 for full day tours, and four to 10-day excursion ranging from $1400 - $1700;
- The visitor experience dynamics are aligned with what travellers are seeking: 88% offer a unique NL experience, 85% connect you to a sense of place, 77% engage the senses and provide interactive activities, and 73% are educational;
- 23% of the activity-based businesses take online reservations, 19% offer packaged independent travel and 15% group travel options; and
- 38% have a TripAdvisor presence; all have positive ratings of 4.5 to 5, most have visitor and professional photos, but there is little dialogue by the operator with guests who post

[91] http://www.lportepilot.ca/News/Local/2015-09-30/article-4293316/The-best-of-the-best/1

comments.

Implications/Considerations

- Activity-Based Tourism Businesses are a core asset to the region providing a wide range of experiences to choose from year-round. These businesses facilitate the 'WHY' of travel in creating ways to experience the destination that connect visitors to the locals;
- Ensuring these tourism assets are fully leveraged and seasonally optimized through packaging is important to extending the visitor opportunities into the shoulder seasons providing an integrated guest experience. Attention should be directed at leveraging activity based assets that are available in shoulder seasons, especially May, June, September and October;
- Continually refreshing the product offered and encouraging more diversified experiences could help differentiate the region and enhance the revenue opportunities; and
- Growth in business and revenue for core activity-based (whale and iceberg watching and kayaking, for example) will come as operators enhance their basic offer, and for those interested, add enhanced, higher experiences that support higher fees.

OUTFITTERS

There are 51 Outfitting companies servicing angling and hunting enthusiasts, so additional data was gathered to provide a better level of understanding about these assets.

Table 45: All Central Region Outfitters

Outfitters (Angling and Hunting)	# of Companies (51 total)	Percentage
Market-ready product for consumer sales	45	88%
Private camp/property by invitation	2	4%
Significant Infrastructure	51	100%
Temporary Camps (minimum infrastructure)	0	0%

Table 46: Seasonality of the Outfitters Offering Angling

Angling/Outfitters	# Of Visitor Opportunities	Seasonality of Operations		
		% Year Round	% 6 month + operation	% High season only
Total Number of Companies (28) **Number of Locations (41)**	N =41	15%	59%	27%

Note1: A number of the companies list here as offering angling, also offer hunting that is captured in Tables 47 & 48

Note 2: Data was not available for all assets.

Table 47: Characteristics of the 28 Outfitters Offering Angling at 41 Locations

Angling Outfitters	# Of Assets	% Of Assets	Price Range
Program Length			
1 hour programs (or less)	0	0%	-
2 – 3 hour programs	0	0%	-
Half day programs	0	0%	-
Full day activities	8	20%	Not provided
2 – 3 day excursions	12	29%	$650.00
4 – 7 day excursions	28	68%	$850.00 - $7,600
8 – 10 day excursions	3	7%	$1,850.00 - $7,600.00
11 – 14 day excursions	0	0%	-

Program Dynamics			
Single site-based activity	15	37%	
Multi-destination based activity	26	63%	
Guided	41	100%	
Self-discovery	0	0%	
Experience Dynamics (Answered to the best of their ability)			
Educational	8	20%	
Physical	33	80%	
Social	24	59%	
Spiritual	Not evaluated	-	
Connects you to the place	24	59%	
Connects you to the people	24	59%	
Connects you to the culture	24	59%	
Engages the senses	24	59%	
Interactive/hands-on engagement	33	80%	
Unique to Newfoundland & Labrador	0	0%	
Behind-the-scenes experience	0	0%	
Skill			
No skill required (e.g. never fished)	41	100%	
Some skill required (e.g. fished a few times, know a bit about fishing)	33	80%	
Highly skilled requirements (e.g. experienced fisher).	24	59%	
Availability			
Sell direct to travellers	32	78%	
Packaged Independent Travel Options	33	80%	
Group Travel Options	11	27%	

Table 48: Seasonality of Outfitters Offering Hunting Only

Hunting/Outfitters	# Of Visitor Opportunities	Seasonality of Operations		
		% Year Round	% 6 month + operation	% High season only
Total Number of Companies (43) Number of Locations (70)	N = 70	11%	60%	29%

Note1: A number of the companies list here as offering angling, also offer hunting that is captured in Tables 47 & 48

Note 2: Data was not available for all assets.

Table 49: Characteristics of the 42 Outfitters Offering Hunting at 70 Locations

Hunting Outfitters	# Of Assets	% Of Assets	Price Range
Program Length			
1 hour programs (or less)	0	0%	-
2 – 3 hour programs	0	0%	-
Half Day programs	0	0%	-
Full Day activities	7	10%	Not provided
2 – 3 day excursions	11	16%	$650.00
4 – 7 day excursions	50	71%	$850.00 – $9,995.00
8 – 10 day excursions	9	13%	$1,850.00 - $7,600.00
11 – 14 day excursions	9	13%	$3,900.00 - $5,850.00
Program Dynamics			
Single site-based activity	10	14%	
Multi-destination based activity	60	85%	
Guided	70	100%	
Self-discovery	0	0%	
Experience Dynamics (Answered to the best of their ability)			
Educational	10	14%	
Physical	54	77%	
Social	38	54%	
Spiritual	Not evaluated	-	
Connects you to the place	38	54%	
Connects you to the people	38	54%	
Connects you to the culture	38	54%	

Hunting Outfitters	# Of Assets	% Of Assets	Price Range
Engages the senses	38	54%	
Interactive/hands-on engagement	54	87%	
Unique to Newfoundland & Labrador	4	6%	
Behind-the-scenes experience	0	0%	
Skill			
No skill required (e.g. never hunted)	70	100%	
Some skill required (e.g. hunted a few times, know a bit about hunting)	54	77%	
Highly skilled requirements (e.g. experienced hunter).	38	62%	
Availability			
Sell direct to travellers	52	85%	
Packaged Independent Travel options	53	87%	
Group Travel Options	15	54%	

Key Findings

- A total of 51 outfitters offering hunting and angling are present;
- Angling and hunting excursions of four to seven days are the most prevalent, 68% of companies offer angling packages for $850 to $7,600 per person, 71% offer hunting ranging in price from $850 - $9,995 per person;
- In terms of skill level required to participate in outfitting activities within the Central region, all of the angling outfitters and hunting outfitters can accommodate people with no skills;
- The sense of connection to people, place, culture, as well as levels of hands-on-engagement is very similar with hunting and angling;
- Sales channels are limited for direct sales and packaged tours for independent groups;
- Within Newfoundland, April to May is the best time to hunt for spring bear and coyote, September to October is the best time for fall bear, caribou, moose, coyote and duck, and from the fall through to the winter is the best time to hunt for seabirds;
- The Newfoundland Labrador Outfitters Association (NLOA) received an injection of resources ($400K) to their core funding in 2015, so are able to focus on working with member operators to achieve results, rather than focus on securing memberships to be sustainable;
- Outfitting sector concerns/issues raised in stakeholder session within the Central region include:
  - The popularity of guides free-lancing was reported to be growing as they can make up to $1000/week, which is on average more than they would be paid by an outfitter. The difficulty is that anyone with a NL Hunting and Angling guide license can take visitors out to their cottage; these are often unlicensed accommodations, non-TAP approved operators, NLOA is leading the efforts to address this challenge with government;
  - It's easier to sell angling tours than hunting, yet both are important to the sustainability of the business and diversity of guest offer;
  - When government changes policy that impacts outfitters, they are not adequately consulted forcing them to adjust their business practices which is often a challenge;
- As reported in the Western region, and reiterated in the Central region, the NLOA reports there may be opportunity to increase visitation to the region by non-resident anglers if more outfitters offered complete angling packages that included a professional certified guide, accommodations and other

services. Additionally:

- Outfitters are not currently allowed to advertise angling tours on the provincial tourism website or in the provincial travellers guide unless they offer other types of non-consumptive adventure tours; 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 businesses from becoming a thriving tourism asset in the Central region and steps must be taken to address and remove these barriers including:
- (a) the thriving black market economy, which includes cash and favours for service,
- (b) cost of insurance, and
- (c) challenges that 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 angling activity is considered 'consumptive' and presently there is a provincial moratorium on establishing new commercial sports fishing enterprises on Crown Land.
- 69% of the outfitters have a website with a strong majority providing ‘how to get here’ information (89%), photos of the infrastructure (91%) and visitor engagement (91%) and 93% accepts phone and email reservations, however none accept online reservations; and
- None of the outfitters have a TripAdvisor account, while 33% have a Facebook business presence which is very similar to the Western and Labrador regions.

Implications/Considerations

- There are many iconic places for sport fishing in the Central region, however, to draw focus and attention to the vast range of opportunities within a North American context, Bishop Falls on the Exploits River could be positioned as ‘the iconic’ spot for fishing in the Central region so that notoriety is drawn to the area;
- There is an opportunity for HNL to work with the NLOA to cultivate a ‘culture of professional certified guides’ that ensures they are licensed, TAP approved (including the packaging/accommodations they may offer), and combine both guide for hire and full-service packaging options in an open/transparent way for visitors;
- As only 11% of the outfitters are open year-round, (59% are open for six months of the year), it raises the question: Could a core group wanting to extend their season offer an introduction leisure fisher/hunter package in-season, and ATV’ing, snowmobiling, photography or boat tours in alternate seasons. Opportunities to explore one or two-day trips outside traditional times could provide opportunities for interested operators to extend the use of their camps and secure higher-end excursion or corporate retreats that incorporate activities such as learning to tie flies, cook jigs dinner, cape an animal, weapons maintenance or other activities that introduce and educate guests to the sport of hunting and angling;
- If day fishing licenses were available and could be purchased by tourism businesses, the potential for ‘introductory’ angling visitor experiences could be developed and offered by other operators in the tourism industry;
- The Western region TDVAA identified that in “terms of being able to connect guides to anglers and hunters the Department of Environment and Conservation, Wildlife Division maintains a provincial guide registry and it was intended to share this information with the NLOA and to have information available through the Department and supported visitor services programs. This has relevance to the Central region. The current database has approximately 1,100 identified guides within the province, 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”[92]. Anecdotally, in the Central region, VIC staff have identified that visitors have requested information on finding an angling guide; and

[92] Add citation from TDVAA Western once report finalized and we have a page number

- Future challenges with marketing are being forecasted because angling/hunting are separated out from general tourism marketing activities making it difficult if companies start to broaden their product offer to include more leisure activities, such as photography or other non-hunting/angling guest experiences, as they are not included in the provincial tourism marketing materials.

People/Program Based Tourism Assets

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

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 50: Program – People Based Companies

Program Based Companies	Number N=47	Seasonality			# with critical acclaim		
		% Year Round	% at least 6 months	% high season only	Provincial	National	Inter-national
Storytellers	20	Availability varies by person and from year to year			2	2	0
Learning Vacations	0				-	-	-
Educational Tours	16				2	1	0
Public Speakers	12				3	3	1
Contract Guides / Guide for Hire	15				0	0	0
Artisans (Crafts, Quilters, Painters)	3				0	2	0
Musicians	12				5	1	0
Comedians	6				2	2	0
Interpretive Guides	24				3	1	0
Actors / Actresses	6				0	2	1

Note: *The information in this table was gathered by the data collection team as TDMS does not current track this information.*

Table 51: Festivals and Event Statistics for the Destination

Total Number of Festival & Events	**77**	**Length**			
		1-day	**2-3 day**	**4-7 days**	**1 week +**
Community/recreation event	49[1]	18	14	10	1
Realistic tourism draw for NL residents from 80+km away	22[1]	2	13	2	3
Realistic tourism draw for non-resident travellers	6[2]	1	2	3	0

[1]Festival length data was not available for 8 festivals.
[2]The six festivals identified by Adventure Central as attracting non-resident travellers are the: Exploits Valley Salmon Festival, Miawpukek Annual Pow Wow, the Burlington Gathering Festival, the Great Fogo Island Punt Race, Twillingate/New World Island Fish Fun & Folk Festival and the Winterset in Summer Literary Festival

Table 52: Types of Festivals and Events

Types of Festivals Events	**# Of Events**	**# Of Attendees**
Community Celebrations	52	Few statistics on attendance. Of those reporting it ranges from 50 for several smaller community events to 8000 – 9000 with the Exploits Valley Salmon Festival
Cultural Experiences	12	
Historical/Cultural Experiences	4	
Music	38	
Performing Arts	16	
Sports and Recreation	10	
Winter	13	

Note: Some events are counted in more than one category.

Key Findings

- The data from this region reports it has one of the highest number of people/program based tourism assets reported to date. This remains a difficult tourism category to capture as TDMS does not track this element as a tourism asset, but this study is the first step in bringing these visitor opportunities, plus business-to-business opportunities to the forefront supporting the notion that visitors are seeking the connection to local, authentic people and experiences when they travel;
- A broad number of celebrated musicians, storytellers, comedians and artisans bring critical acclaim to the Central region such as actor Gordon Pinsent, comedians Shawn Majumder and Dave Saunders, Cold Water Cowboy Television Series, musician Kevin Blackmore (Buddywasisname and the Other Fellas), and artisan/storytellers Stan Hill and David Hayashida;
- The Shorefast Foundation on Fogo Island reports 20 to 25 community hosts, a unique and noteworthy program within the Central region that connects visitors to local area islanders (for a fee) for a personalized tour of the island. Guests at the Fogo Island Inn have access to a local area storyteller included in their accommodation fee;
- Community stakeholders assert that the number of artisans (3) reported is incorrect (Table 50), the location to find most of this talent would be with the Craft Council of NL or the NL Arts Council;

  - The number of Contract Guides/Guides for Hire (15) is an initial assessment. Other guides may not have been captured in the study timeframe. This category did not include the provincially licensed angling and hunting guides and according to Adventure Central, most are not licensed outfitting guides, rather they are interpretive guides that are willing and capable of guiding a variety of tours and activities. These guides represent an important business-to-consumer (B2C) and business-to-business (B2B) opportunity to enrich the guest experience;
- The region is rich in a diverse array of festivals and events (Table 52). Of the 77 recorded events; 49 are community/recreation based, 22 (29%) draw NL residents from 80km or more, and six (8%) attract non-resident travellers;
- One-day events are most common for the community based festivals and events, two to three days for those attracting guests from within the province, and four to seven days / events are most common for those attracting non-resident travellers;
- Attendance data is not consistently tracked by all Festivals / Events within the Central region, but from the information available community festivals range from 50 people for smaller community events to thousands for the larger events such as the Burlington Gathering Festival, Exploits Valley Salmon Festival or the Fish Fun and Folk Festival; and
- There is mixed stakeholder opinion regarding profiling a few major festivals as a draw to the region vs. promoting all of the 26 provincial/non-resident traveller festivals and events attracting visitors as a way to communicate there is ‘lots happening on a regular basis in the Central region’.

Implications/Considerations

- The array of people and program based tourism assets in the Central region that can connect visitors to the locals and their way of life contribute to the quality and memorability of the visitor experience. This could also be said for the festivals and events offered throughout the Central region.
- They present opportunities to charge program fees and often link to additional retail sales associated with the experience.
- This is an underdeveloped opportunity in the Central region, indeed the entire province, and should be better leveraged as a way to share the stories of the people and place while at the same time generating new revenue streams;
- Festivals that have provincial critical acclaim, last more than two days, and attract visitors from away should be featured as primary reasons to visit the region (E.g. Roots, Rants and Roars in Eastern and Trails, Tails and Tunes in Western), as opposed to promoting all events, this will provide a focus greater appeal for the region and for visitors from away to motivate a trip;
- Stakeholders within the region indicated that future tourism studies of this nature should include the NL Arts Council and NL Craft Councils databases as they currently have lists of artisans located throughout the province. Further, efforts should be made to integrate and align these organizations and people with the tourism industry to increase the opportunities for visitors and businesses alike;
- Consideration to a regional events calendar should be explored by Adventure Central to help educate communities about the wide range of events, when they are happening, co- and cross promote and minimize overlap; and
- BTCRD could explore adding this new tourism asset category into TDMS with defined variables to begin to capture and promote those that offer experiences directly to visitors, as well as consider a Business to Business (B2B) category so that operators can easily identify individuals they can partner or package with to enhance the guest experience.

TOURISM DEMAND GENERATORS

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

Table 53: Destination's Primary Tourism Demand Generators

Demand Generators -– Primary	Location
Iceberg Alley and the coastal whales and iceberg watching	Multiple coastal communities across the north and south coasts of the region
Twillingate/New World Island	
Fogo Island Inn and Island	
Terra Nova National Park	
Various Outfitting Lodges	Throughout the region

Note: This list represents a subjective assessment, grounded in data on trip motivations, visitation stats, critical acclaim, conventional wisdom, and suggestions by Adventure Central and the BTCRD staff.

Definition: Iconic places, attractions and activities that are the 'main reason' domestic AND international travellers choose a destination. They have a distinct competitive positioning and visitor appeal and by their nature bring business to others in the region.

Key Findings

- Iceberg Alley is by far the most famous identifier for the Central region;
- The Twillingate / New World Island area is a well-developed tourism destination with a broad range of accommodations, activities, restaurants, craft shops, trails, and museums;
- The Fogo Island Inn has received international recognition and quite literally put Fogo Island on the map, thus drawing attention to Fogo Island and the nearby coastal communities of Change Island, Twillingate and Lewisporte;
- Terra Nova, the region's only National Park, and various outfitting lodges are reported to have loyal clientele and the ability to draw visitors from away;
- Given the vast geography of the Central region, many of the communities have one or two special reasons to engage a visitor once in town. Examples of secondary demand generators include, but are not limited to:
- Barbour Village Living Heritage Village in New-Wes-Valley
- Beothuk Interpretation Centre Provincial Historic Site in Boyd's Cove
- Brimstone Head Four Corners of the World on Fogo Island
- Exploits Valley Salmon Festival in Grand Falls -Windsor
- Miawpukek Annual Pow Wow in Conne River
- Riverfront Chalets Rafting in Grand Falls - Windsor
- Salmonid Interpretation Centre in Grand Falls-Windsor
- Snowmobiling in Buchans Plateau/Gaff Topsail, Hodges Hill, Mount Peyton, Mount Sylvester
- The Beaches Arts & Heritage Centre in Eastport
- The Gathering Festival in Burlington
- Winterset in Summer Literary Festival in Eastport

Implications/Considerations

- The Central region has the opportunity to build on its icons, which currently have the strongest visitor experience and continue to draw national and international attention to the destination. Getting to these places requires a journey – developing the capacity of businesses and communities along the travel route is essential to ensure visitor satisfaction is met and/or surpassed on the entire journey and not just at the iconic sites; and
- Building fully independent travel (FIT) itineraries could encourage and assist guests in knowing where to focus their travel activities once off the Trans-Canada Highway. This no doubt will enhance their experience.

4.2.4 Sustainability Dimension

4. This section provides a high-level assessment of the Central region'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 Environmenental Economics Social/Cultural	Essential resource investments to sustain a viable tourism business and destination into the future.

HUMAN RESOURCES

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

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

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

HR4: There is evidence the destination is making investments in tourism industry training and tourism business development within the last five years (2010 – 2014). [NO]

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

Table 54: Full-time Tourism Jobs in NL[93]

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

Key Findings

- Human resource conversations acknowledge that finding year-round workers can be a challenge;
- Stakeholder validation sessions surfaced the issue that people who have been unemployed for an extended period of time may fall between the cracks for they are not entitled to qualify for some of the job-start programs. Benefits of the Targeted Older Workers initiative[94]was mentioned as a program that could be expanded to reach and engage the semi-retired, retiring Baby-Boomer population that could be a real asset to the tourism industry;
- There are a number of examples where labour and skills development is available to the tourism industry. These include:
- HNL and DMO related workshops (safety, service, market readiness, online navigation),
- The Bonavista Institute for Cultural Tourism (culinary, partnerships, cultural tourism),
- The Gros Morne Institute for Sustainable Tourism (experiential travel, adventure tourism, sustainability),
- Some regional CBDC courses (accounting, bookkeeping, supply chain, succession planning),
- SmartForceNL – CoursePark (Online sponsored/subsidized learning by the NL government), and the
- College of the North Atlantic offers a range of programs from short tourism training courses to a two-year diploma in hospitality tourism management.
- There is some evidence of succession planning, for example BTCRD's BR&E program, 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 Central branch of the Newfoundland and Labrador Organization of Women Entrepreneurs;
- The NLOA released a new Best Practices for Outfitters and Guides at its 2014 AGM; this should be used as an effective tool for advancing the development of the profession;

[93] 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.

[94] Government of Newfoundland & Labrador Advanced Education and Skills. (2014). *Targeted initiative for older workers. Request for proposals.* A government funding program to support NL's unemployed older workers.

- The preliminary findings from this study that were shared with stakeholders during the regional consultations identified only a 22% uptake for TripAdvisor and was proposing training adopt a more personalize approach to working 1:1 with operators to ensure they have an account, optimize it, and teach them how to respond – with the goal that they leave the session ready to engage. The Central region identified this as an opportunity for immediate action, following the emerging recommendation for more personalized 1:1 assistance to operators and launched a pilot project in Kings Point to optimize the town's 10 tourism businesses over the summer.

> "Our goal was to work one-on-one with tourism operators in a practical manner to create, claim and optimize their TripAdvisor presence. We were able to reach this goal of optimizing all operators within the Town of King's Point, by tailoring our engagement to the individual operator"
>
> Shannon Pinsent, Executive Director of Adventure Central Newfoundland (28 Sep 2015)

- The TripAdvisor results were impressive:[95]
- Number of businesses claiming their listing shifted from 1 to 10;
- Uploading of high quality photos and videos: from 1 to 10;
- Ensuring an updated listing: from 0 to 10;
- Adding a TripAdvisor tab to the operators Facebook page: from 3 to 10
- Having a system in place to listen and respond to comments: from 3 to 7 (remaining 3 sites have no official claimant);
- Directly responds to reviews: from 1 to 7;
- Display a TripAdvisor sticker at their business: from 2 to 10;
- Ensure their listing is appearing on the TripAdvisor App: from 2 to 10.

Implications/Considerations

- Any tourism related human resource development aimed at addressing challenges in the coming years should recognize the efforts being made currently by partners including, HNL, Adventure Central, BTCRD, ACOA, GMIST, Bonavista Institute for Cultural Tourism, College of the North Atlantic, among others;
- Exploring how to entice older workers to consider tourism as a semi-retirement/retired work option is important as they are active, experienced and good workers with a strong work ethic, yet they have different needs and motivations for working in later life. The generational mix on a staff can drive benefits to the visitor and the business for each age cohort brings different talents, passion, and community understanding to the job;
- Customer service training emerged consistently as a need, however it was pointed out that asking an employer to send someone out for a day, only to have them quit a few weeks later is a cost too high for some small operators to bear. Creative solutions need to occur including more online programs, considering CTHRC E-merit programs, World Host – as they are all affordable alternatives with long/strong track records. Additionally, an on-the-job assessment program could be considered that allows the general weaknesses of a company to be identified and entire staff training occur, rather than individuals along.
- 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. Additionally, looking at securing employment for partners/spouses to attract a couple to the region may attract families to relocate to more remote or rural areas.
  As market competition for skilled staff will continue, creative solutions and wages alone need to complement the benefits; and

---

[95] Huxter, B. (Aug, 2015). *King's Point Pilot Project – Final Report TripAdvisor - Increasing Tourism Operator Revenues*. An internal document provided by Adventure Central NL.

- The pilot project for optimizing TripAdvisor on a personalize coaching and support in King's Point was a success. Through funding support from the Department of Advanced Education and Skills this resulted in a highly valuable, cost-effective marketing investment with direct benefits to visitors, the business, and the community by having them all go through the same business enhancement during the same period. This approach should be replicated in other communities.
-
-

SALES AND MARKETING PRACTICES

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

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 there 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. [ALMOST]

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 Servicing the Central Region[96]

<table>
<tr><th colspan="2">Tour Operators Selling into the Canada Market and International & USA Markets</th></tr>
<tr><td colspan="2">• Anderson Vacations
• Collette
• Globus Travel
• McCarthy’s Party
• Maxxim Vacations
• Routes to Learning Canada & Elderhostel (via RLC)
• Trafalgar
• Vision Atlantic Vacations
• Wildland Tours</td></tr>
<tr><th>Selling into the Canadian Market</th><th>Only Selling into International & USA Markets</th></tr>
<tr><td>• Adventure Caravans
• Atlantic Tours
• DeNure Tours
• Eastern Edge Cultural Adventures
• Hamilton Tours
• Hanover Holiday Tours
• Jonview Canada
• Nagel Tours
• Seniors Tours
• Travac
• Wells Gray Tours
• West World Tours</td><td>• 1st Class Holidays (UK)
• America Unlimited GmbH (Germany)
• Barrhead Travel (UK)
• Bridge and Wickers (UK)
• Butterfield and Robinson
• Canadian Affair (UK)
• Canadian Tours International
• CANUSA Touristik GmbH (Germany)
• Canadvac Travel Service
• Cox and Kings (UK)
• CRD International (Germany)
• DER Touristik (German)
• Discover the World (UK)
• Elderhostel via RLC
• Entrée Canada
• Frontier Travel (UK)
• International Expeditions
• Meriers Weltreisen (Germany)
• Miki Enterprises
• My Canada Trips (UK)
• Thomas Cook (UK)
• Windows on the Wild (UK)</td></tr>
</table>

[96] Data provided via email from Charlotte Jewczyk, Manager of Market Development/Travel Trade, BTCRD (7 Apr 2015).

Table 56: Terra Nova National Park Tour Bus Statistics 2011 – 2014[97]

Terra Nova National Park Bus Tours (Year to date October 2014)					
	2011	2012	2013	2014	2011 – 2014 Change
Commercial Buses	46	46	34	35	-24%
# People	1484	1370	1229	1315	-11%
Not for Profit Buses	30	33	26	29	-3%
# People	747	997	981	1208	+62%
Total # Bus Tours	76	79	60	64	-16%
Total # Visitors	2,231	2,367	2,210	2,523	+13%

Table 57: Participates in Advertorials by Region[98]

	Western	**Central**	**Eastern**	**North East Avalon**	**Labrador**
2015 *(as of May)*	49	21	7	10	6
2014	49	32	8	7	7

Key Findings

- There are nine receptive tour operators that offer services in the Central region with interest in selling into the Canadian, USA and international markets, 12 to the domestic market only and 22 to USA and International markets (Table 55);
- Parks Canada reported a 16% decrease in the number of total bus tours visiting Terra Nova National Park from 2011 to 2014 but an overall 13% increase in the number of visitors, it appears this is influenced by the growth in number of people travelling via motor coach affiliated with not-for-profit organizations (Table 56);
- Adventure Central works closely with many receptive tour operators that service the region but does not currently maintain an active list of these businesses. This is a missed opportunity for working with operators to create products, packages and itineraries annually for purchase will enhance travel trade and FIT/group business;
- Interviews with select tour operators, communications with ACN and BTCRD staff, and community stakeholders indicate the desire to sell the Central region to travel trade is high for two main reasons:
- Guests want to get off the main highway between St. Johns and Deer Lake and explore smaller communities off the beaten path, and
- The Fogo Island Inn has shone a spotlight on the Twillingate/Fogo Island area which has increased interest with the travel trade;
- The challenges with selling the Central region include:
- The number of larger quality accommodation options is limited, and where it is available (Grand Falls - Windsor and Gander) it does not meet the needs of guests wanting to experience small coastal communities;

[97] Looking for source. Note sent to Caroline and Karen Wolf 11 May

[98] Data provided via email from Andrew Weir, Advertising Officer, BTCRD (19 May 2015).

- Tourism operators are reluctant to accommodate receptive tour operators in July and August; during these months' visitation is strong enough therefore they do not need to complement this with receptive tour operators who in reality, could drive business outside these high months if tourism operators fully promoted and accommodated for tour group travel during the off-season. This has been reported to be tied to a lack of understanding of revenue yield management techniques by tour operators interviewed and stakeholders interviewed and the fact the travel trade requires for a discount for which operators are reluctant to give during the two months of the year when they are fully booked with their top rates;
- May and June represent potential months for iceberg viewing, however, pin pointing when the season begins each year is difficult as icebergs have been spotted along the Central region coastline as early as February and as late as August;
- Taking groups to Fogo Island and Change Island is highly restricted for receptive tour operators as there are no ferry reservations and space is often limited which impacts their ability to ensure their itineraries stay on schedule; and
- Proposals for funding can be considered on a "case by case" basis for business expansion and improvement. It may, however, be difficult to secure funding due to competitive impact on existing business. Therefore, funding may not be available to encourage new accommodation development of a size necessary to accommodate group travel facilitated by tour operators in key areas such as Twillingate, Lewisporte, Glovertown, and Kings Point.
- Wi-Fi at accommodations is no longer a 'nice to have', it is essential, similar to room configurations that include options, such as two double beds or a king sized bed with private bathrooms.
- The DMO regional packaging program offered by the province allows for revenue to be generated to the region for every package Adventure Central assists in placing into the provincial marketing material. The Central region is the second strongest region for taking advantage of this program (Table 57).
- The Adventure Central 2014 – 2017 Strategic Economic Plan states: "Simply put, AC aims to generate new visitors, new revenue and new opportunities by strengthening its marketing and product, and lengthening the tourism season. [99]" It goes on to detail that the goals of AC are to:
- Create marketing synergies and opportunities within the membership,
- Serve as a central "host" in providing information to tourists, meeting planners, tour operators, travel agencies, travel media and transportation companies, BTCRD and HNL,
- Be a support agency to all members of ACN in the areas of marketing, product development & market readiness.

Implications/Considerations

- BTCRD should consider setting targets for the regional DMO's, including Adventure Central, to encourage them to increase the number of group and FIT packages listed on the provincial website. Adventure Central has a goal of 20 packages but reports that for several years the consumer uptake has been low and participation dropped when BTCRD stopped doing the direct mailer and moved solely online. Sharing the metrics of success with operators could stimulate interest as could case studies on companies that have succeeded to increase their business through working with the travel trade;
- Adventure Central should create and actively maintain proactive working relationships with receptive tour operators interested in the region;
- Assistance is needed in training and coaching businesses with the greatest potential to package with receptive tour operators (e.g. Twillingate, Fogo Island, Lewisporte, Kings Point, Glovertown). HNL should take the lead here. Interviews with tour operators from the Central region and the provincial travel trade representative highlighted areas where this training

[99] Adventure Central Newfoundland. (2014, Mar. 31). *Adventure Central Newfoundland strategic economic plan 2014 – 2017.* P. 1. A document provided by the DMO.

should focus:

- Understanding how the travel trade works – traditional Receptive Tour Operators as well as working with online packagers (emerging capacity);
- Yield management;
- Negotiating cancellation policies to avoid operators holding space for 18 potential tours and only delivering on six tours;
- Commissions and pricing;
- Room configuration;
- Benefits (financial to marketing reach to attracting guests that may otherwise never find the company);
- Types of choices guests are seeking; and
- Itinerary building considerations.

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). [NO]

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

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

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

Key Findings

- Surprisingly little emerged relative to this category in the Central region, which could be in part because there are limited tourism resource management practices in NL. It does not imply that good practices are not occurring with individual businesses or community, rather nothing was provided in the form of documentation, nor did discussions emerge regarding potential topics such as environmental stewardship, human-use impact, environmental monitoring or the impact of tourism or tourism issues related to the environment and host communities.
- According to Adventure Central, there are some provincial initiatives and discussions happening such as the best practices for tour boats and whale interactions. Many companies within the Central region have risk management plans and codes of conduct, however, these components are not publicly promoted. In addition, they report:
- There are a variety of ‘green’ tourism businesses but they do not openly market as being green or sustainable,
- Reciprocal altruism in relation to tourisms’ impact on host communities and the impact of operators on visitors is an issue identified to be discussed;
- Some environmental impact studies have been done for specific development areas and watersheds such as the Gander river and salmon stocks throughout the Central region.
- Responsible practices also need to be addressed when designing new experiences and building partnerships with contract guides/guides for hire.
- The outfitting association has been looking at the amount of moose, and caribou in relation to licenses provided and outfitter businesses.

Implications/Considerations

- As much of the visitor appeal is nature based, responsible tourism practices and environmental stewardship should be practiced at all times to ensure the preservation of the natural environment.
- With the expansion of offerings into the travel trade market, host communities will need to consider social impacts tourism will have on their area.
-

STRATEGIC PLANNING & INVESTMENT

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

SPI2: The destination has a current strategy in place to guide their investments and product development activities. [NO]

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. [NO]

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

Key Findings

- There is evidence that the region is aware of the *Vision 2020* provincial tourism strategy and that this is a foundational strategy that guides much of the tourism management activity;
- There was evidence that tourism is included in some municipal plans but the data collection revealed that few communities submitted a plan and where this occurred, there were few practical recommendations for growing the industry;
- There are a number of community based reports, plans and studies focused on single initiatives that take into account the broader development opportunities for the region or province;
- Adventure Central reports they are looking to adjust their marketing plan in the near future. The main regional branding will not change, but the marketing methods may change when an in-depth communication and marketing plan is developed.
- Efforts in recent months to develop experience profile forms for operators to use as a guide when developing new experiences are being created.
- Adventure Central's 2014 – 2017 Strategic Economic Plan (March 31, 2014) outlines the direction the organization will follow through 2017. It is very high level and relative to product and market development there are a limited number of activities including: participating as a partner in the implementation of the Destination Development Plan (this project), and in assisting with the education and coaching of operators towards TAP approval;
- There has been significant investment in infrastructure, but attaching a program/experience element to these spaces to generate new revenue streams is lacking.
- Key investments in airport expansion and increased accommodations complement the variety of smaller projects in the pipeline that together will grow the Central region's visitor appeal.

Implications/Considerations

- While efforts have been made by communities within the Central region to have a strategic approach to tourism development, there is little evidence that there is an understanding of how a regional approach to tourism development could benefit the collective over the long-term;
- There is little evidence that communities are using a regional approach to tourism development and understanding how their area can be incorporated into a broader regional approach to tourism development plan;
- A strategic regional approach to tourism development would prioritize individual projects that have the greatest potential to impact regional tourism over the long-term and where government investment is warranted rather than lobbying to have individual projects funded;
- In the past, DMO's have focused efforts more on promotions, industry engagement and revenue generation as evidenced by product development representing 8% of Adventure Central's budget, compared to marketing and communications at 21%, industry engagement and initiatives at 4%. As of November 2014 however, Adventure Central secured a full-time Product Development Manager to support operators in the region and provide a liaison function with BTCRD who has the lead role in experience development provincially.[100]

[100] Adventure Central Newfoundland. (2014, Mar. 31). *Adventure Central Newfoundland strategic economic plan 2014 – 2017.* P. 24. A document provided by the DMO.

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 on par or above year-round occupancy. [NO]

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

KPI3: Occupancy from commercial accommodations is spread throughout the year in the Central region. [ALMOST]

Table 58: Tourism Assurance Plan Approval[101]

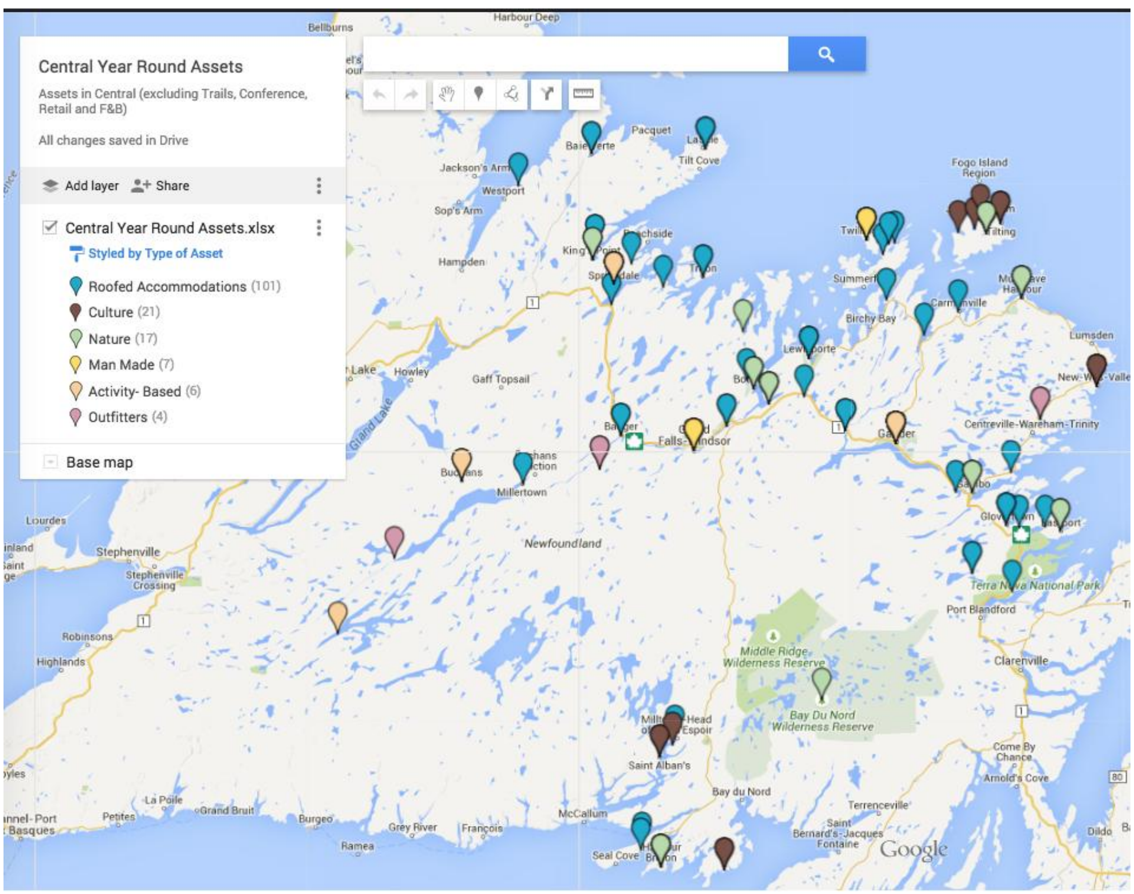
	Total # of Assets in TDMS	**Non-TAP Approved**	**% Non-TAP Approved**
Accommodations	173	28	16%
Campgrounds	30	11	37%
Attractions and Adventures	216	56	26%
Shopping	40	23	58%
Festivals and Events	70	10	14%

[101] Government of Newfoundland & Labrador. (2015, Apr 2). *A list of non-tap compliant business in the Central region as of 2 April 2015.* A document provided by Linette Moores of the Department of Business, Tourism, Culture and Rural Development via email to support the project analysis.

Table 59: Seasonality

Type	Open Year Round	High Season Only (Jun – Sep)	Open 6-months of the Year
Culture and Heritage Based Assets	24%	59%	16%
Nature Based Assets	37%	54%	54%
Activity Based Businesses	23%	62%	15%
Trails and Routes	70%	3%	27%
Outfitters Businesses	11%	29%	59%
Man-Made Attractions	33%	52%	14%
Retail	56%	33%	10%
Restaurants	86%	4%	10%

Figure 6: Central Region Year Round Assets Google Map



Key Findings

- 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 regional/sub-regional results are limited by available sources;
- The Central regions' Destination Development Plan is the first region to be in a position to report on TAP approved operations. While the number of TAP approved businesses can change daily, on April 2, 2015 non-approved operators in the Central region ranged from a low of 14% in the Festivals and Events category, to 37% in the RV and Campground sector to a high of 58% in the Shopping/Retail sector.
- HNL, BTCRD, and Adventure Central now have a benchmark on which to monitor progress. As well, individual businesses who did not achieve TAP approval can be approached to determine if they:
- Simply did not realize what the program was and the impact of not ensuring approval;
- Are struggling on criteria (insurance is the one reported most), or
- Are not planning on becoming approved and will forego the marketing presence as a result of not being in the program.
- As well, during the stakeholder validation sessions, it was learned that TAP approved operators will seek to partner and package, as well as refer their guests to other TAP approved businesses, so to support the basic levels of practice for visitors.
- The number of year-round tourism businesses, beyond accommodations was a surprise discovery impacting cultural assets, nature-based assets, activity-based assets, outfitters and man-made assets (Figure 6). They are located around the region and represent up to 23% of business activity as reported through the project data collection process;
- Despite a positive 8.7% increase in ADR in the Central region from 2013 to 2014, overall, the regions performance was flat. The increase was impacted by the opening of the Fogo Island Inn which opened in June 2013.
- The region's total available room nights dropped from 474,697 in 2009 to 446,178 in 2014 resulting in 28,519 fewer rooms available for sale, which at the 2014 ADR of $121.68 (see Table 27). There is an understanding that some operators may reconfigure their rooms to alter their capacity, for example, expanding the size of a room to attract a higher rate, and this could have some impact on this.

Implications/Considerations

- The Central 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 as will addressing an increase in the quality of hotel accommodation;
- The potential to align tourism businesses operating year-round to create inspiring winter and shoulder season packages should be explored, thus bringing a benefit to the operators but also a program revenue to Adventure Central; and
- Similar to the Better Business Bureau, HNL could develop a logo for tourism operators to advertise (online or traditional media) that they are TAP approved to begin to generate consumer awareness of businesses that meet the basic industry standards; and
- Insurance challenges vary depending on the tourism sector and type of business, however, the RV/Campground Sector and the People/Program Tourism Assets are the most concerning.

5. Implementation Plan

What Does Implementation Look Like in the Central 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 Central 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.

This is the fourth regional TDVAA project completed. The scope of the consultants' responsibilities for the TDVAA process in the Central region concludes with providing development recommendations and implementation guidelines. Following acceptance of the Central region 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 the Central region's TDVAA process can then understand and plan for the impact on 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

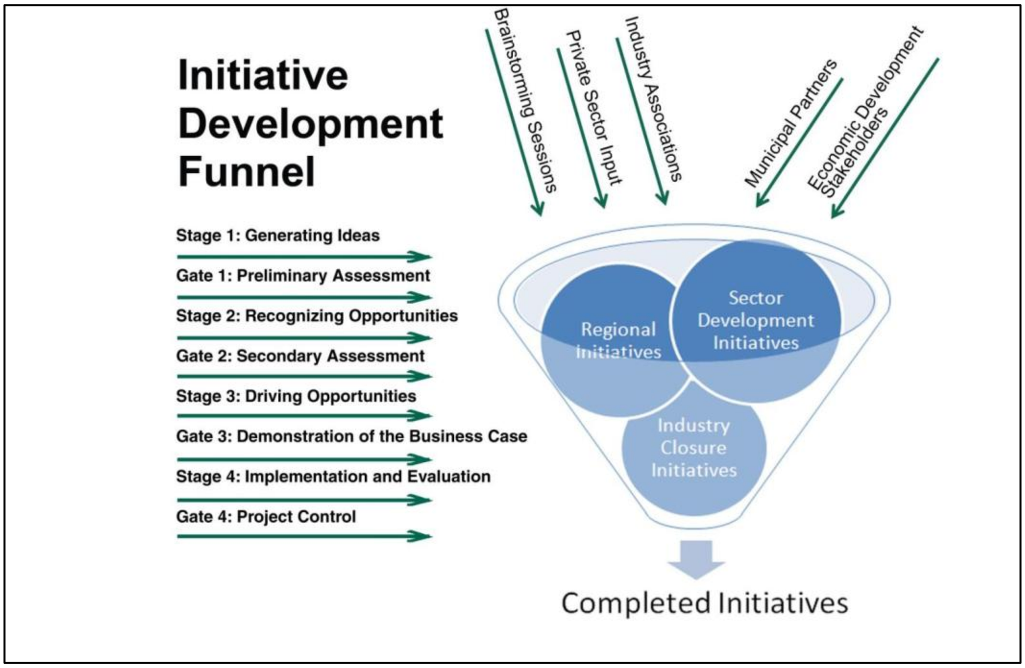
Phase 3 – Driving Opportunities

- 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 (%), assigned 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 Central, TDVAA Advisory Committee, ACN and its regional board, 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 60 proposes a launch sequence for consideration.

Table 60 TDVAA Implementation Launch

Task	Detail	Timing	Resp.
NL Tourism Board, HNL Board, BTCRD, ACN approves/adopts/ accepts the study and its recommendations	HNL/BTCRD to facilitate the approval process The HNL management team presents the study to their Board, BTCRD, ACOA for acceptance, approval and adoption	Jan 2016	HNL, BTCRD, ACN
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	Feb 2016	Operators, ACN, HNL, ACOA, BTCRD
BTCRD spearheads the OM process to prioritize the long-term recommendations	BTCRD facilitates a prioritization process with the ACOA, HNL, ACN and their Advisory Committee. NL Tourism Board is accountable for implementation; keep them in the loop	Mar/Apr 2016	HNL, ACN, BTCRD, Tourism Board Mgr.
Budget implications for different organizations	Start of fiscal year, ability to incorporate	Apr/May 2016	HNL, ACN, 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	May – On going	ACOA, HNL, BTCRD, ACN
Provincial/HNL Others Implementation	Develop list of implementation plans and deliverables with accountability to the Tourism Board	Jun 2016	HNL, BTCRD, ACN
Round One Implementation Roll Out	Monitor implementation activity, report quarterly on progress to Tourism Board, develop Central destination development report card to track activity and progress	Begins: Jul 2016	HNL, BTCRD, ACN
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 Central region and its operators will be implemented by an *Implementation Task Team.* 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 Central region 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 Central region, 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 Central 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.

Table 61 highlights 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 61 Head Start Recommendations That Can Begin Immediately

Finding	Action
1	**BTCRD, HNL & ACN:** All the Central region's projects in the pipeline[102] would benefit from the Opportunity Management (OM) in considering their merit relative to demonstrating their contribution increasing intercommunity collaboration, enhancing customer service standards, and generating new revenue with market-ready visitor experiences that can be sold direct to the market, and packaged where appropriate.
2	**BTCRD:** Consider leveraging the 2015 local provincial stories being aired on TV and YouTube, with additional vignettes for 2016 or 2017 that share stories from visitors who enjoy getting off the beaten track and stay at inns, B&Bs and cottages. It would be an opportunity to showcase the personalization and authentic connections between the B&B/Cottage/Inn hosts and visitors in the provincial videos. **B&Bs and BTCRD:** B&B's are ideal information sources for travellers. In essence, they promote what there is to do in the area. As new and innovative ways to provide visitor servicing is being addressed across the country, this presents an opportunity for collaboration between operators and the province to support the guest experience.

[102] Eleven Projects in the Pipeline were identified for the Central region including: Twillingate New World Island Digital Arts Festival, North Atlantic Aviation Museum Ferry Command Memorial Hall, Gander International Airport Terminal and Adaptive Reuse Plan, Change Island Newfoundland Pont Refuge, The Miawpukek First Nation Tourism Development Strategy, Grand Falls Windsor Scotts Avenue Chalet, Gander Strategic Plan, Boyd's Cove Beothuk Interpretation Centre, Red Indian Lank and the Eastport Peninsula Heritage Society's sustainable practices framework for continuing to deliver visitor programming. A description of each project is located in Table 3, Chapter 4, page 41).

3	**ACN**, **Municipal Tourism Representatives and Recreational Boating Venues:** Examine the asset base of visitor activities and amenities, plus the scheduling of community events (boat races, ATV / snowmobile events) to determine if there is the potential to coordinate and market an invitation to communities that lure visitors at different times of the summer season, and for different reasons. This will create a 'reason' to travel the coastal highways and draw visitors into communities at key times based on existing product and identify gaps and opportunities for new experiential product development aligned with the provincial brand.
4	**ACN, BTCRD & Operators:** Potential exists to mine the database (created for the TDVAA) and sort by community, or journey route to partner opportunities that could lead to the creation of new visitor experiences and/or packages with businesses that are open year-round. With this knowledge, work with operators and BTCRD to promote the off-season potential of the Central region. Important to this process would be the ability to search by date by the visitor.
5	**Shorefast Foundation, ACN & Operators**: Position Fogo Island as an anchor to drive visitors from Gander, Deer Lake and St. Johns. Present a selection of themed independent travel itineraries that will appeal to non-resident travelers to wind their way to Twillingate, then Fogo Island profiling the architecture and fishing history of the coastal communities of Central NL. The critical link here will be quality and customer service alignment on proposed routes and for the activities and experiences identified. **Department of Transportation and Works:** Improve the Fogo Island access ferry terminal washroom facilities in Farewell and Stag Harbour as well as washroom facilities at other ferry locations as required for locals and visitors alike. As well, improve the visitor experience through increased signage to communicate fees, where/how to pay, where to park, where to line up, washroom locations, etc. As industry moves to raise the bar on TAP compliance, the government too has the opportunity to look at basic service levels for important elements such as washrooms that benefit NL and visitors alike. **ACN, Operators, BTCRD:** Given the Gander Airports increased air access, everyone with an interest in growing tourism in the Central region should make a concerted effort to ensure visitors are aware of the opportunities of using the Gander International Airport as a gateway to Central NL. Given the proximity of the Baie Verte – Green Bay part of the region, encouraging guests to arrive in Gander and depart in Deer Lake (or vice versa) could serve the broader region well.
6	**HNL, RANL, BICT & ACN:** Collaborate to offer specialized training, with online and face-to-face options, focused on teaching ways to adapt menus that appeal to a wider range of customers. As very few establishments listed in RANL's e-dining database identified that they were offering heart healthy foods (12%), local foods (19%), gluten free (9%), local beverages (31%) and senior's menus (2%), these represent possibilities for menu enhancements. Increasing the "Healthy or Local Dining Options" that compliment the appetizers, mains and dessert sections currently offered would be desirable. ACN could support RANL to identify and invite businesses with the highest potential to engage to launch the initiative, plus play a role in ensuring marketing of this expanded choice to travellers in 2016. **HNL, RANL, and BICT:** Encourage food and beverage providers to invest in service training as well as evaluating the quality of the offering. As guests travel through a region, they will be looking for quality and consistency and businesses that choose to focus on raising the bar in these two areas will be able to differentiate their establishment and product offer.
7	**BTCRD, ACOA, Parks Canada, Municipalities, ACN and Operators:** Embrace and adopt BTCRD's cluster based approach for trail development in the Central 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.
8	**ACN, Tour Operators and BTCRD:** Adventure Central in collaboration with BTCRD could take a proactive role in meeting with key FIT and group tour operators to pinpoint where the greatest packaging potential is and work with receptive operators in the area to develop new itineraries that in a variety of smaller rural communities. There is a joint opportunity here for a win-win outcome by helping operators reach new markets by working with tour operators who are looking for new packages, and together ensure the product offer is described and promoted well to visitors. In addition, these packages could contribute a new revenue stream and increase a company's exposure when posted to the provincial website.
9	**BTCRD & Shorefast Foundation:** Collaborate on creating a case study that provides the history, benefits to visitors, business and communities, and explains the business model for operating the Community Host program. Provide insights and suggestions for other communities to introduce this program in the future. By organizing community hosts through a single organization allows for one business to meet the TAP criteria. Businesses wanting to ensure a personalized, authentic, memorable experience for their guests can arrange this through one organization that also serves as the point of sale for all community hosts.
10	**BTCRD, ACN & Municipalities:** Engage municipalities and other organizations, such as Chambers of Commerce, in discussions about the future roles and responsibilities and financial support that can be leveraged to develop a visitor servicing strategy that meets the needs of future travellers, is affordable and is staffed and maintained effectively.
11	**ACN, Newfoundland and Labrador Arts Council (Arts NL), Visual Arts NL (VANL), Central NL Visual Arts Society (CNVAS), Craft Council of NL and BTCRD**: Reach out to all artisans (visual artists through to crafts people) in the Central region who have the potential to engage visitors in their studios/communities to determine the level of interest in creating a suite of visual arts visitor experiences that could be delivered on a regular or special basis (e.g. conferences, FAM trips, special events). Create a short list of artists, the diversity of their product (e.g. fabric, print, photography, clay, wood), and their location as a starting point to begin mapping out where the pockets of opportunity exist currently, forming content for the development and marketing of new experiences to be in-market for 2016 or 2017.
12	**ACN & HNL:** Extract from the TDVAA database the tourism businesses without a website, TripAdvisor page and/or Facebook account to create a list of operators that could be approached to invest in enhancing the reach of their business by using these tools. ACN could take the lead on connecting with businesses to explain the importance of this missed opportunity relative to why visitors use these sites as part of their trip planning and decision making process. HNL could develop three targeted one-day workshops that take an operator from a state of non-engagement, to understanding the relevance, how to invest, the level of effort required to maintain, the conversation protocols expected by consumers and how to use these marketing tools. For TripAdvisor and Facebook specifically, have them leave the workshop having created a presence and started opportunities for online conversation through these effective tools. The training must go beyond relevance and benefits and include 'hands-on keyboard' learning/doing. ACN can use the baseline data from the TDVAA to monitor uptake and improvements over the next two to three years.
12	**Operators**: For businesses with a website, add experience descriptions, videos and photos of visitors engaged in activities that show potential visitors the type of experience they can anticipate. Ensure a call to action for direct sales is evident, and if working with the travel trade and/or travel media or would like to attract this type of interest, ensure information and a call to action is included on specific landing pages. Investigate online reservation systems,

	ensuring there is "how to get here information", and for the 44% that do not accept credit card payment, explore electronic payment options from traditional credit card companies, to PayPal and Square (as a few examples) in order to offer this important visitor service.
13	**HNL, BTCRD, ACN, NLOA, NL Arts Council & Outfitters:** Meet to discuss the potential for expanding the traditional focus of the outfitting businesses and identify strategies to diversify the product offer, extend season and facility use for other tourism purposes. Appreciating only a selection of operators will want to embrace this type of business evolution, BTCRD can provide product development support to those interested. HNL/NLOA could offer specialized training for this group with the goal of having new tourism products for new markets related to hunting and fishing in market for 2016 or 2017. **ACN, BTCRD, & NLOA:** Take a proactive role in helping outfitters understand how to move beyond 'listing their business on the internet' to effectively convey the experience differentiation and enhancing the call-to-action and ways to close the sale relative to today's consumer expectations. Focusing on specific measures – such as communicating where to buy a fishing license, and having staff that sell them aware of the fishing opportunities complements the online marketing efforts and adds the personalization factor once guests are in community.
14	**Total Quality Assurance (TQA):** Similar to the Better Business Bureau (BBB) which provides a logo for business websites and office-front windows, HNL should explore providing a similar type of identifier to recognize companies that are TAP approved and build consumer recognition around operators who meet the provincial standard. **ACN & HNL:** ACN should continue to track the non-approved businesses in their region and reach out to them individually to determine what is limiting their ability to become TAP approved. They should continue to document the insights to understand where the challenges exist for their operators and share with HNL. This adds to the foundation of regional insight for HNL to monitor the program with regional input. While festivals and events are already captured in TDMS, continued communications and ongoing clarity is needed for businesses hiring musicians, local experience providers, artists and other individuals who enhance the visitor experience but may not be registered and operating as a tourism business. **Operators:** While TAP approved businesses are able to partner with non-TAP approved businesses, as a best practice, operators should align with TAP approved businesses to build the consumer awareness of this designation and if they are partnering with a non-insured partner consider placing them on insurance rider[103] with their company.

[103] An insurance rider is a provision to an insurance policy that is purchased separately from the basic policy and provides additional benefits at additional cost. Riders help policyholders create insurance products that meet their specific needs.

15	**BTCRD & RANL:** Critically review the variables examined in the TDVAA, consult with restaurateurs, and the BICT to ensure the full range of variables important to visitors are captured in the new variables for this category in the database. **Operators & ACN:** BTCRD and RANL are in discussions to have food and beverage operators complete a Tourism Operator Profile form to become part of the provincial tourism marketing system. ACN can be instrumental in ensuring operators are aware of the opportunity when it is introduced and ensure everyone signs up. Operators will need to complete the forms ensuring the declarations they make on the form (e.g. regarding vegetarian, vegan, gluten etc.) are honest and will reflect what a visitor can enjoy at their establishment.
16	**Tourism Board:** Consider amending five *Vision 2020* goal statements

Appendices

Appendix 1: Contributing Stakeholders

The following individuals contributed to the TDVAA process for the Central region.

Project Sponsor

Contracted the TDVAA and assumed overall management and budget responsibility for the project. They provided the link between the project managers and their Board of Directors or senior management staff. Appointed staff on the core project team include:

- 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 Leads. Contracted through an RFP was:

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

Regional Destination Project Leads

Oversaw the destination-based activities related to the TDVAA Industry Advisory Committee, stakeholder engagement, 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. They also provided the regional voice and perspectives important to the validation process, findings and ultimate recommendations. The Central region team members were:

- Shannon Pinsent, Executive Director, Adventure Central Newfoundland
- Caroline Swan, Product Development Manager, Adventure Central Newfoundland
- Chris Tuck, Regional Product Development Officer, Central Region. Department of 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, CEO
- 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, Yvonne Hardy, Account Manager Community Economic Development
- Legendary Coasts of Eastern Newfoundland, Kathi Stacey, Executive Director
- Adventure Central Newfoundland, Shannon Pinsent, Executive Director
- Go Western, 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 Industry Advisory Committee (Table 62) 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 62: TDVAA Central Committee Members

Name	Company	Category	Sub-Region
Bill Brake	Terra Nova National Park	Parks & Campgrounds	Lewisporte-Bonavista North-Terra Nova
Colleen Lambert	Miawpukek First Nations	Tourism, Culture, Recreation – Festival & Events	Bay D'Espoir-Harbour Breton
Cory Abbott	Destination Gander	Non-profit, Festival & Events, Meetings & Conventions	Lewisporte-Bonavista North-Terra Nova
Cory Foster	Newfoundland & Labrador Outfitters Association	Non-profit, Outfitters	All Regions
David Hayashida	Kings Point Pottery	Craft Artisan, Shopping, Non-profit	Baie Verte Peninsula and Green Bay
Fred Parsons	Sanger Memorial RV Park/ Environment Resources Management Association	Parks & Campgrounds, Attractions, Shopping	Buchans-Botwood-Notre Dame Bay
Gary Hennessey	Town of Grand Falls - Windsor	Municipality, Festivals & Events	Buchans-Botwood-Notre Dame Bay
Jason Sparkes	Town of Springdale	Municipality, Attractions, Parks & Campgrounds	Baie Verte Peninsula and Green Bay
Jennifer Whalen	Dorset Trail Tourism Association / CBDC Emerald Zone	Non-profit, Festivals & Events	Baie Verte Peninsula and Green Bay
Judy Stagg	Barbour Living Heritage Village	Accommodations, Food & Beverage, Attractions, Shopping	Lewisporte-Bonavista North-Terra Nova
Kelly Siever	Town of Gander	Municipality, Festival & Events	Lewisporte-Bonavista North-Terra Nova
Nick Soper	Airport Nordic Ski Club	Non-profit, Attractions	Lewisporte-Bonavista North-Terra Nova
Shar-lett Matchim	Inn at Happy Adventure / Secretary of the ACN regional board	Accommodations, Food & Beverage, Tours	Lewisporte-Bonavista North-Terra Nova
Stan Hill	Dashwood's Diner	Craft Artisan, Food & Beverage	Bay D'Espoir-Harbour Breton
Tanya Rogers	Town of Harbour Breton	Municipality, Attractions	Bay D'Espoir-Harbour Breton
Wayne Hallett	Prints of Whales Inn Chair of the ACN regional board	Accommodations, Non-profit	Lewisporte-Bonavista North-Terra Nova
Wilma Hartman	Twillingate STEP Committee / Anchor Inn Hotel and Suites	Accommodations, Food & Beverage, Non-profit	Lewisporte-Bonavista North-Terra Nova

Nola and Paul Snyder	Coffee Cove Seaside Retreat	Accommodations	Baie Verte Peninsula and Green Bay
Pauline Payne	Shorefast Foundation / Fogo Island Inn	Accommodations, Food & Beverage, Attractions, Shopping, Non-profit, Tours	Lewisporte-Bonavista North-Terra Nova

Data Collection Team

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

- Scott Andrews, BTCRD
- Jackie Harnum, BTCRD
- Trudy Winter, BTCRD
- Chris Tuck, BTCRD
- Krista Noseworthy, VIC Counsellor
- Ryan Osmond, VIC Counsellor
- Caroline Swan, Adventure Central Newfoundland
- Matt Molloy, Adventure Central Newfoundland
- Shannon Pinsent, Adventure Central Newfoundland
- Sheldon Pardy, Contract with Adventure Central Newfoundland
- Tanya White, Contract with Adventure Central Newfoundland
- Jason Sparkes, Town of Springdale

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. (BTCRD).

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. (BTCRD).

Art gallery: A gallery for the display of artistic works as defined by BTCRD.

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. (BTCRD).

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 BTCRD.

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.

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. (BTCRD).

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

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. (BTCRD).

Craft shop: A premise whose principal use is the sale or display of crafts produced in the Province. The craft shop is listed in the Tourism Destination Management System database of BTCRD.

Critical Acclaim: A tourism business has exceptionally high reviews and is looked upon enthusiastically and publicly by critics in the industry. This is demonstrated through international, national, or provincial awards, honors, multiple and consistently positive media reviews/blog coverage. It is not about local newspaper articles or awards related to ad spend, rather an earned public awareness of the entity.

Designated hiking/walking trails: A hiking/walking trail that is recognized by BTCRD as a travel generator that is maintained and monitored by a group or organization. (BTCRD).

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. (BTCRD).

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. (BTCRD).

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. (BTCRD).

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

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. (BTCRD).

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. (BTCRD).

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. (BTCRD).

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

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. (BTCRD).

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

Tourism assets: Individual guest opportunities that are marketed and purchasable, or packaged for a visitor to enjoy. 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 Assurance Plan (TAP): A set of common, minimum quality standards for tourism businesses that must be met in order for tourism services and attractions to participate in provincial and regional destination marketing and development initiatives.

Tourism Destination Management System (TDMS): A database of tourism products and services managed by BTCRD.

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

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

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

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

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

Tour operation means a development established for the purpose of providing guided tours in areas of special interest. The tour operator is listed in the BTCRD Tourism Destination Management System.

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

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

Visitor economy: Encompasses everything that attracts visitors to a destination; everything that make a place special, distinctive and capable of engendering pride and interest and a place worth experiencing. A successful visitor economy requires managing all of the components in an integrated and long-term way, with a clear focus on the needs of the visitors the destination is seeking to attract and the destination brand.

Appendix 3: Bibliography

International Documents

Asker, S., Carrard, N., & Paddon, M. (2010). *Effective community based tourism: A best practice manual.* A document produced from the outcomes of the Asia-Pacific Economic Cooperation (APEC) Tourism Working Group.

Fodders. *(2015, January). Fodor's go list 2015.* (Document provided by Adventure Central Newfoundland.

J. Blanke, & T. Chiesa (Eds.). (2013). *The travel & tourism competitiveness report 2013: Reducing barriers to economic growth and job creation.* J. Blanke, & T. Chiesa (Eds.). A document produced by the World Economic Forum, retrieved from http://www3.weforum.org/docs/WEF_TT_Competitiveness_Report_2013.pdf

UN World Tourism Organization. (2014). *World Tourism Organization tourism highlights 2014 Edition*. Retrieved from: www.mkt.unwto.org

UN World Tourism Organization. (2014, August). *UNWTO World Tourism Barometer. (Vol 12)*. Retrieved from www.unwto.org/pub

UN World Tourism Organization. (2013, August). *UNWTO world tourism barometer. (Vol. 11)*. Retrieved from: www.unwto.org

UN World Tourism Organization. (2007). *A practical guide to tourism destination managemen*t. Retrieved from: https://pub.unwto.org/WebRoot/Store/Shops/Infoshop/4745/8BCE/AD9A/ECA8/048B/C0A8/0164/0B7A/071115_practical_guide_destination_management_excerpt.pdf

Unknown. (2010, October). *Promoting NL walking and hiking product: Lessons learned from New Zealand.* Document provided by the Western Destination Marketing Organization.

World Travel & Tourism Council. (2013, June). *Travel and tourism trends and economic impact.* Retrieved from: http://www.wttc.org/site_media/uploads/downloads/WTTC_monthly_update_June_2013.pdf

National Documents

Atlantic Canada Opportunities Agency. (2011). *Tourism Atlantic's accelerated market readiness program (AMR).* Document provided by the NL Department of Tourism, Culture and Recreation.

Atlantic Canada Trail Association. (unknown). *Destination trail evaluation.* Document provided by the NL Department of Tourism, Culture and Recreation.

Atlantic Salmon Federation. (2014). *Federal government response an important first step to Atlantic salmon restoration.* Retrieved December 30, 2014, from http://www.asf.ca/federal-government-response-an-important-first-step-to-atla.html

Canadian Camping and RV Council. (2015). *Camping industry portrait in Canada and Atlantic provinces.* Retrieved from http://www.ccrvc.ca/docs/Atlantic%20Provinces-%20campingv4p1.pdf

Canadian Camping and RV Council. (2015). *Economic impact of the Canadian camping industry and analysis of trends.* Document retrieved from http://www.ccrvc.ca/docs/2015-Economic-impact-of-camping-in-CanadaA.pdf

Canadian Chamber of Commerce. (2013, July). *Restoring Canadian tourism: A discussion paper.* Retrieved from: http://www.chamber.ca/download.aspx?t=0&pid=834e382b-e8e3-e211-aaf9-000c29c04ade

Canadian Government, Department of International Trade. (2013). *Global markets action plan: The blueprint for creating jobs and opportunities for Canadians through trade.* Retrieved from: http://international.gc.ca/global-markets-marches-mondiaux/assets/pdfs/plan-eng.pdf

Canadian Tourism Commission. (2015, May). ***Canada's** tourism industry*. Retrieved from http://en.destinationcanada.com/sites/default/files/pdf/media_centre/media_centre_resources/tourism_industry_fact_sheet_final_may_2015_en.pdf

Canadian Tourism Commission. (2015, March). *Tourism Snapshot* (11)13. Retrieved from http://publications.gc.ca/collections/collection_2015/ic/Iu85-3-11-3-eng.pdf

Canadian Tourism Commission. (2015, January). *Tourism snapshot,* 10 (12). Retrieved from: http://en-corporate.canada.travel/sites/default/files/pdf/Research/Stats-figures/International-visitor-arrivals/Tourism-monthly-snapshot/tourismsnapshot_2015_01_eng_lowres.pdf

Canadian Tourism Commission. (2014, December). *Tourism snapshot,* 10 (12). Retrieved from: http://en-corporate.canada.travel/sites/default/files/pdf/Research/Stats-figures/International-visitor-arrivals/Tourism-monthly-snapshot/tourismsnapshot_2014_12_eng.pdf

Canadian Tourism Commission. (2014, June). *Tourism as Canada's engine for growth: 2014-2018. Corporate plan summary.* Retrieved from: http://en-corporate.canada.travel/sites/default/files/pdf/Corporate_reports/cp_summary_2014-2018_-_june_9_e.pdf.

Canadian Tourism Commission. (2014). *Global tourism watch – 2014 Canada summary report.* Retrieved from http://en.destinationcanada.com/sites/default/files/pdf/Research/Market-knowledge/Global-tourism-watch/UK/gtw_canada_2014_summary_report_eng.pdf

Canadian Tourism Commission. (2014). *Marketing Canada in an ever-changing world.* Document retrieved from https://en-corporate.canada.travel/sites/default/files/pdf/Corporate_reports/2015-2019_corporate_plan_summary_e_no_foreword.pdf

Canadian Tourism Commission. (2012, October). *Sport fishing and game hunting in Canada: An assessment on the potential international tourism opportunity*. Retrieved from: http://en-corporate.canada.travel/sites/default/files/pdf/Research/Product-knowledge/Product-research/07082013_the_hunting_landscape_rev1.pdf

Canadian Tourism Human Resource Council. (2012, March). *Attracting and retaining tourism talent: Current labour issues and future challenges.* A powerpoint presentation for the HNL Board of Directors Meeting March 23, 2012.

Canadian Tourism Commission. (2012). *Explorer Quotient™ toolkit*. Retrieved from http://en-corporate.canada.travel/sites/default/files/pdf/Resources/EQ/v2/eq_toolkit.pdf

Canadian Tourism Commission. (2012). *Experiences toolkit (2nd Edition).* Retrieved from http://en-corporate.canada.travel/sites/default/files/pdf/Resources/sec_exptoolkit_lores_final.pdf

Canadian Tourism Human Resource Council (unknown). *Summary compensation tables: Newfoundland & Labrador.* Extracts from the Canadian Compensation Study.

Clorey, C. (2013, September).*Tourism best practices: Arts and culture tourism products clustering final report.* Retrieved from: http://tourismbestpractices.com/uploads/document/Final%20Report_Arts%20and%20Culture.pdf

Conference Board of Canada. (2013, September). *Gateway to growth: Tourism competitive benchmarking study.* A report produced for the Canadian Tourism Commission and the Tourism Industry Association of Canada. Retrieved from: http://tiac.travel/_Library/TIAC_Publications/2013_Domestic_Tourism_Benchmarking_WEB_FINAL_EN.pdf

Deloitte LLP. (2015). *Mind the gaps: The 2015 Deloitte millennial survey.* Retrieved from http://www2.deloitte.com/global/en/pages/about-deloitte/articles/2015-millennial-survey-press-release.html

Deloitte LLP. (2015). *The gender gap: The 2015 Deloitte millennial survey*. Document retrieved from https://www2.deloitte.com/content/dam/Deloitte/global/Documents/About-Deloitte/gx-wef-2015-gender-gap-millennial-survey.pdf

Deloitte LLP. (2015). *Tourism in Canada: Seizing economic growth.* Retrieved from: http://www.hotelassociation.ca/pdf/Tourism%20in%20Canada%20-%20Seizing%20Economic%20Growth.pdf

Deloitte LLP. (2014). *Hospitality 2015: Game changers or spectators?* Retrieved from: https://www.deloitte.com/assets/Dcom-Uruguay/Local%20Assets/Documents/Industrias/Uy_Hospitality_2015.pdf

Deloitte LLP & Tourism Industry Association of Canada. (2013, November). *Passport to Growth: How international arrivals stimulate Canadian exports*. Retrieved from: http://media.deloitte.ca/flash/insights/ca_en_insights_tourism_and_trade_111313.pdf

Deloitte LLP & Tourism Industry Association of Canada. (Winter 2013). *Navigate: New directions in tourism, hospitality and leisure.* (*Vol. 7).* Retrieved from: http://tiac.travel/_Library/TIAC_Publications/ca_en_Navigate2013_winter_112513.pdf

Deloitte LLP. (2013, September). *Consumer business economic update.* Retrieved from: *http://www.deloitte.com/assets/Dcom-Canada/Local%20Assets/Documents/CB/ca_en_cb_economic_update_Q32013_100313.pdf*

Deloitte & Touche LLP. (2008). *Tourism amid turmoil: How Canadian companies can compete.* A research report prepared for TIAC. Retrieved from http://tiac.travel/_Library/documents/deloitte_tourism_amid_turmoil.pdf

Deloitte & Touche LLP. (2007). *Destination Canada, Are we doing enough?* A research report prepared for TIAC. Retrieved from http://www.deloitte.com/assets/Dcom-Canada/Local%20Assets/Documents/ca_en_cb_destinationcanada_june07(2).pdf

Fair, Chris (2014, November). *The resonance report: Canadian quality tourism performance report.* Retrieved from http://www.resonanceco.com/cdnreport.html

Federal Provincial Culture/Heritage & Tourism Initiative. (2013, September). *Proposed strategic plan - September 2010 to August 2013.* Document provided by the NL Department of Tourism, Culture and Recreation.

Fitzgerald, R. (2005). *Challenges facing rural communities: A Newfoundland and Labrador perspective. Canadian parliamentary review. (Vol. 28, Issue 3).* pp. 1-6. Retrieved from: http://www.revparl.ca/english/issue.asp?art=1151&param=171

Gardner Pinfold. (2011, September). *Economic Value of wild Atlantic salmon.* Retrieved from http://0101.nccdn.net/1_5/13f/2a0/0fe/value-wild-salmon-final.pdf

Go2HR. (2014). *Baby boomer toolkit: Employer's toolkit for attracting, recruiting and retaining baby boomers.* Retrieved from https://www.go2hr.ca/sites/default/files/legacy/pdf/go2hr-Baby-Boomer-Tool-Kit.pdf

Government of Canada. (2012). *Federal tourism strategy annual report 2012.* Retrieved from: http://www.tourism.gc.ca/eic/site/034.nsf/vwapj/FTS_Annual_Report_2012-eng.pdf/$FILE/FTS_Annual_Report_2012-eng.pdf.

GrantThornton (2013, June). *Visitor services program jurisdictional review: Destination BC.* A study produced for the Visitor Services branch of Destination BC. Retrieved from: http://www.qica.com.au/images/stories/qica-pdf/bcresearch.pdf

HLT Advisory Inc., Tourism Industry Association of Canada, & Visa Canada. (2012, Fall). *The Canadian tourism industry: A special report.* Retrieved from http://tiac.travel/_Library/documents/The_Canadian_Tourism_Industry_-_A_Special_Report_Web_Optimized_.pdf

Hotel Association of Canada. (2013, July). *Update on the Competition Bureau and destination marketing programs.* Retrieved from: www.naylornetwork.com/hoc-nwl/articles/index.asp?aid=225979&issueID=29432

Malatest & Associates, R. A. (2012). *2012 Canadian tourism sector compensation study.* Prepared for the Canadian Tourism Human Resource Council.

National Marine Manufacturers Association Canada. (2012). *The economic impact of recreational boating in Canada 2012.* Retrieved from http://www.nmma.ca/assets/cabinets/Cabinet485/NMMA%20Boating%20Economic%20Impact%20Study%202.pdf

National Travel and Tourism Coalition. (2010, October). *Looking to 2020. The future of travel and tourism in Canada.* Retrieved from: http://tiac.travel/_Library/documents/NTTC_Whitepaper_Final.pdf

Parks Canada. (2013, August). *Middle age achievers (families)*. Document provided Parks Canada from their Social Sciences PRIZM reference library.

Parks Canada. (2013, August). *Singles scene (young adults).* Document provided Parks Canada from their Social Sciences PRIZM reference library.

Parks Canada. (2013). *Terra Nova market analysis 2013.* A document provided by Terra Nova National Park.

Parks Canada. (2012). *Terra Nova National Park 2012 visitor information program final report.* A document provided by Terra Nova National Park.

Parks Canada Heritage Lighthouse Program. (2012). *Lighthouses in Newfoundland & Labrador petitioned to be considered for heritage designation under the Heritage Lighthouse Protection Act.* Document provided by the Western Destination Marketing Organization.

Parks Canada. (2009). *Road use monitoring in Terra Nova National Park - June to October 2009.* Document provided by Parks Canada.

Parks Canada. (2008). *Terra Nova National Park of Canada: 2008 visitor information program final report.* A document provided by Terra Nova National Park.

Tourism Industry Association of Canada & Visa. (2015, Winter). *Winter travel snapshot*. Retrieved from http://tiac.travel/_Library/TIAC_Publications/Visa_Canada_Travel_Snapshot_Winter2015.pdf

Tourism Industry Association of Canada. (2014). *2014 Gateway to growth: Creating investment opportunities in the Canadian hotel industry.* Retrieved from: http://tiac.travel/_Library/TIAC_Publications/TIAC_Investment_Review_Final.pdf.

Tourism Industry Association of Canada. (2014). *Gateway to Growth: Travel & Tourism Labour Force Report.* Retrieved from http://tiac.travel/cgi/page.cgi/_zine.html/Home_Header/2014_Gateway_to_Growth_-_Travel_Tourism_Labour_Force_Report

Tourism Industry Association of Canada. (2014). *Gateway to Growth: Visitor VISA Progress Report*. Retrieved from http://tiac.travel/_Library/TIAC_Publications/2013_Progress_Report_Visitor_Visa_WEB.pdf

Tourism Industry Association of Canada. (2013, September). *Gateway to growth driving global opportunity.* A report produced for the Canadian Tourism Commission and the Tourism Industry Association of Canada. Retrieved from: http://tiac.travel/_Library/TIAC_Publications/Gateway_to_Growth_-_Sept_2013_FPT_Meeting_-_Sept_6_EN_-_WEB.pdf

Tourism Industry Association of Canada. (2013). *Gateway to growth. Aiming high: Air access to Canada.* Retrieved from: http://tiac.travel/_Library/TIAC_Publications/2013_Aviation_Paper_WEB.pdf

Tourism Industry Association of Canada. (2013). *Gateway to growth: Connecting America.* Retrieved from: http://tiac.travel/_Library/TIAC_Publications/TIAC_Connecting_America_EN.pdf

Tract Consulting Inc. (2007, October). *Marina strategy study Newfoundland and Labrador.* Retrieved from http://holyroodmarina.ca/acoa_marina_strategy.pdf

PROVINCIAL

Association of Heritage Industries Newfoundland & Labrador. (2012, November). *Report on deliberations. Reach strategies roundtable on sustainability*. Document provided by the NL Department of Tourism, Culture and Recreation.

Bristol Omnifacts Research. (2010, March). *Tourism training needs & industry engagement assessment final report.* Document provided by the NL Department of Tourism, Culture and Recreation.

CBC Radio-Canada. (2015). *Airbnb a risky business that impacts tourism industry: HNL*. Document retrieved from http://www.cbc.ca/news/canada/newfoundland-labrador/airbnb-a-risky-business-that-impacts-tourism-industry-hnl-1.3060373

Cruise NL. (2014, December). *Newfoundland and Labrador 2015 cruise schedule*. Retrieved from: http://www.cruisetheedge.com/

Economic Planning Group & DW Knight Associates. (2010, January). *A special place. A special people: A Newfoundland and Labrador tourism product development strategy.* Document provided by the NL Department of Tourism, Culture and Recreation.

Economic Planning Group & DW Knight Associates. (2004). *A special place. A special people. The future of Newfoundland and Labrador tourism.* A report prepared for the Department of Tourism, Culture and Recreation. Downloaded: http://www.fin.gov.nl.ca/fin/faq/hnl_report.pdf

Globe Advisors. (2011, Sept). *An analysis of the economic development opportunities associated with the green economy in Newfoundland & Labrador*. Vancouver, BC. Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland Labrador (2015, May). *Central region performance indicators as of 11 May 2015.* Document provided by the NL Department of Business, Tourism, Culture and Rural Development.

Government of Newfoundland Labrador (2015, May, 11). *Occupancy and ADR levels for Central Region 2003 – 2014.* Document provided by the NL Department of Business, Tourism, Culture and Rural Development.

Government of Newfoundland Labrador (2015, March) *Year-end provincial tourism performance 2014, March.* Document provided by the NL Department of Business, Tourism, Culture and Rural Development.

Government of Newfoundland & Labrador. (2015, April 2). *A list of non-tap compliant business in the Central region as of 2 April 2015.* A document provided by Linette Moores of the Department of Business, Tourism, Culture and Rural Development via email to support the project analysis.

Government of Newfoundland & Labrador. (2015). *Creating experiences: A toolkit for the tourism industry.* Downloaded: http://www.tcr.gov.nl.ca/tcr/tourism/tourism_development/pdf/NLT2294_NL_toolkit.pdf

Government of Newfoundland & Labrador Advanced Education and Skills. (2014). *Targeted initiative for older workers. Guide for proposals 2012 - 2013.* A government funding program to support NL's unemployed older workers.

Government of Newfoundland & Labrador Advanced Education and Skills. (2014). *Targeted initiative for older workers. Request for proposals.* A government funding program to support NL's unemployed older workers.

Government of Newfoundland & Labrador. (2014). *2003-2013 Occupancy REVPAR ADR province west region zone 6-10.* A western region accommodation special data run from the TDMS provided by the Department of Business, Tourism, Culture and Rural Development.

Government of Newfoundland & Labrador. (2014, August). *Year to Date Tourism Highlights.* Retrieved from http://www.tcr.gov.nl.ca/tcr/publications/2014/Tourism_performance_2014_YTD_August_2014.pdf

Government of Newfoundland & Labrador. (2014, July). Year to Date Tourism Highlights. Retrieved from http://www.tcr.gov.nl.ca/tcr/publications/2014/Tourism_performance_2014_YTD_September_2014.pdf

Government of Newfoundland & Labrador. (2014, March). *Opportunity management overview.* Powerpoint presentation provided by the NL Department of Innovation, Business and Rural Development.

Government of Newfoundland & Labrador. (2014, February). *The Canadian vacation travel market summary.* Conference presentation at the Hospitality Newfoundland and Labrador Conference and Trade Show in Gander NL.

Government of Newfoundland & Labrador. (2014). *Canadian travel market summary March 2014.* Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland and Labrador Tourism Research Division. (2013, April). *Provincial visitor exit survey results summary.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Provincial_Visitor_Exit_Survey_Summary_Updated_April_%202013.pdf

Government of Newfoundland & Labrador. (2013, Fall). *Provincial air access tracking program.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2013/Seat_Capacity_to_NL_Q3_2013.pdf

Government of Newfoundland and Labrador. (2013, November). *Tourism Research: Roofed accommodation occupancy trends 2008 - 2012.* An excel workbook provided by the Department of Tourism, Culture and Recreation.

Government of Newfoundland and Labrador. (2013, November). Tourism research: Roofed accommodation occupancy trends 2008 - 2012. An excel workbook provided by the Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador. (2013). *Airport passenger movements by airport: 1993 to 2012.* An excel workbook provided by the Department of Tourism, Culture and Recreation with data by airport.

Government of Newfoundland and Labrador. (2013). B*ackgrounder year-end provincial tourism performance 2013.* Retrieved by: http://www.tcr.gov.nl.ca/tcr/publications/2012/Tourism_Performance_2012_Province_Final_March_2013.pdf.

Government of Newfoundland & Labrador. (2013). *Fogo island ferry statistics 2008 - 2012.* A document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador. (2013). *Provincial visitor information centre employee list: 2011-2013.* Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador. (2013). *Regional visitor information funding statistics.* Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador. (2013). *Tourism data management system.* Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador. (2013). *Trail development information for project sponsors.* Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador Advanced Education and Skills. (2012). *Targeted initiative for older workers. Guide for proposals 2012 - 2013.* A government funding program to support NL's unemployed older workers.

Government of Newfoundland & Labrador. (2012, 2011, 2010, 2009, 20008, 2007, 2006, 2005, 2004, 2003). *Tourism performance.* Annual performance reports produced by the Department of Tourism Culture and Recreation. Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/index.html#Reports

Government of Newfoundland & Labrador. (2012). *Detailed visitor figures for the visitor information centres.* A document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador. (2012). *Provincial visitor information centre statistics. (May to October 2010 & 2012).* Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador. (2012). *Regional visitor spending comparison 2008 - 2011.* An excel table provided by the Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador. (2012). *Regional visitor information centres provincial grant program (2010, 2011 & 2012).* Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador, Department of Environment and Conservation. (2012). *Statistical report on the parks and natural areas division NL*. Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador. (2012). *Tourism data management system operator profile form.* Document provided by the NL Department of Tourism, Culture and Recreation. Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador. (2012). *Tourism vision evaluation: Annual report 2012.* Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador. (2012. April). *Newfoundland and Labrador labour market: Outlook 2020.* A powerpoint presentation by the Department of Advanced Education and Skills.

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

Government of Newfoundland & Labrador. (2011). *Coastal and ocean management strategy and policy framework.* Document produced by Fisheries and Aquaculture.

Government of Newfoundland & Labrador. (2011). *2011 Exit survey. Program highlights (non-resident).* Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland and Labrador Tourism Research Division. (2011). *2011 Exit survey profile of non-residents visiting an archaeological site.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Visitor_Exit_Survey_Highlights_Document_Final_TCR_Revised.pdf

Government of Newfoundland and Labrador. (2011). *2011 Exit survey: Profile of non-residents visiting for business/convention.* Document provided by the Government of Newfoundland and Labrador Department of Tourism, Culture and Recreation, retrieved from http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit%20Survey_Business_Convention_Visitors.pdf

Government of Newfoundland and Labrador Tourism Research Division. (2011). *2011 Exit survey profile of non-residents visiting. The province's craft/gift shops.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit_Survey_Craft_and_Gift_Shopping.pdf

Government of Newfoundland and Labrador. (2011). 2011 *Exit survey. Profile of non-residents visiting for vacation/pleasure.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Visitor_Exit_Survey_Vacation_Pleasure_Market.pdf

Government of Newfoundland and Labrador. (2011). *2011 Exit survey – Profile of non-residents using a visitor information centre (VIC).* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit_Survey_VIC_Users.pdf.

Government of Newfoundland and Labrador. (2011). *2011 Exit survey – Profile of non-residents visiting from the Maritimes.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Visitor_Exit_Survey_Profile_of_Visitors_from_the_Maritimes.pdf.

Government of Newfoundland and Labrador. (2011). *2011 Exit survey. Profile of non-residents visiting from Quebec.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Visitor_Exit_Survey_Profile_of_Visitors_from_Quebec.pdf

Government of Newfoundland and Labrador. (2011). *2011 Exit survey. Profile of non-residents visiting the central region.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit_Survey_Visitors_to_Central_Region.pdf

Government of Newfoundland and Labrador. (2011). *Exit survey – Profile of non-residents visiting from Ontario.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Visitor_Exit_Survey_Profile_of_Visitors_from_Ontario.pdf.

Government of Newfoundland and Labrador. (2011). *2011 Exit survey – Profile of non-residents visiting from Western/Northern Canada.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Visitor_Exit_Survey_Profile_of_Visitors_from_Western_Northern%20Canada.pdf.

Government of Newfoundland and Labrador. (2011). 2011 Exit survey. Profile of non-residents visiting from the United States. Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Visitor_Exit_Survey_Profile_of_Visitors_from_the_United_States.pdf

Government of Newfoundland and Labrador. (2011). *2011 Exit survey. Profile of non-residents visiting Newfoundland and Labrador alone.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit_Survey_Profile_of_Non_Resident_Visitors_Travelling_Alone.pdf

Government of Newfoundland and Labrador. (2011). *2011 Exit survey profile of non-residents. Participating in geological tours/fossil observation.* Retrieved from:

http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Visitor_Exit_Survey_Geological_Tours_Fossil_Observation.pdf

Government of Newfoundland and Labrador. (2011). *2011 Exit survey profile of non-residents visiting the province's historic sites.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit_Survey_Historic_Sites_Visitors.pdf

Government of Newfoundland and Labrador. (2011). *2011 Exit survey profile of non-residents participating in pleasure walking in/around communities.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Visitor_Exit_Survey_Pleasure_walking_in_around_Communities.pdf

Government of Newfoundland and Labrador. (2011). *2011 Exit survey profile of non-resident trail hikers*. Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Visitor_Exit_Survey_Trail_Hikers.pdf

Government of Newfoundland and Labrador. (2011). *2011 Exit survey profile of non-residents travelling alone.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit_Survey_Profile_of_Non_Resident_Visitors_Travelling_Alone.pdf

Government of Newfoundland and Labrador. (2011). *2011 Exit survey profile of non-residents visiting from the United States.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Visitor_Exit_Survey_Profile_of_Visitors_from_the_United_States.pdf

Government of Newfoundland & Labrador. (2011). *2011 Exit survey — whales, birds & icebergs (non-resident) NL.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit_Survey_Whales_Birds_and_Icebergs.pdf

Government of Newfoundland and Labrador. (2011). *2011 exit survey – profile of non-residents visiting for vacation/pleasure.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Visitor_Exit_Survey_Vacation_Pleasure_Market.pdf

Government of Newfoundland and Labrador. (2011). *2011 exit survey – profile of non-residents visiting friends and relatives.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit_Survey_VFR_Visitors.pdf

Government of Newfoundland and Labrador. (2011). *2011 exit survey profile of non-residents visiting the central region (economic zones 11-14).* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit_Survey_Visitors_to_Central_Region.pdf

Government of Newfoundland & Labrador. (2011). *Newfoundland and Labrador labour market outlook 2020.* A report prepared by the Department of Human Resources, Labour and Employment. http://www.aes.gov.nl.ca/publications/LMOutlook2020.pdf

Government of Newfoundland & Labrador. (2011). *Recommendation for the tourist oriented directional signage program (TODS) for Newfoundland and Labrador.* Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland and Labrador. (2010, Jan). *A special place a special people: A Newfoundland and Labrador tourism product development strategy.* Source Unknown.

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

Government of Newfoundland and Labrador. (2007). *Active, healthy Newfoundland and Labrador. A recreation sport strategy for Newfoundland and Labrador.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2007/active_healthyNL.pdf

Government of Newfoundland & Labrador. (2007). *TDMS data definitions.* Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador. (no date). *Brand positioning statement.* Retrieved from www.tcr.gov.nl.ca/tcr/tourism/tourism_marketing/newfoundland_and_labrador_brand

Government of Newfoundland & Labrador. (no date). *Guide to angling.* Retrieved from www.newfoundlandlabrador.com/PlanYourTrip/TravelBrochures

Government of Newfoundland & Labrador. (no date). *Guide to Hunting.* Retrieved from Retrieved from www.newfoundlandlabrador.com/PlanYourTrip/TravelBrochures

Government of Newfoundland and Labrador. (no date). *The crisis: Recommendations for a sustainable heritage secto*r. A draft report provided by the NL Department of Tourism, Culture and Recreation.

Harris decimal. (2014). *Newfoundland and Labrador – non-resident travel motivations study 2014 – profile of Canadian travelers.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2014/Newfoundland_Labrador_%20Non-Resident_Travel_Motivations_Survey_Canadian_Travellers.pdf

Haynes, R., & Winter, T. (2015, February). Personal Communication regarding VICs. Document provided by Adventure Central Newfoundland.

Haynes, R. (2008). *Where do the Newfoundland and Labrador travel/tourism numbers come from?* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Where_Tourism_Numbers_Come_From.pdf

Higgins, K. (2014, June). *Stay a while. The Southern Gazette.* Retrieved from http://www.southerngazette.ca/News/Local/2014-06-18/article-3767515/Stay-awhile/1

Hospitality Newfoundland and Labrador. (2015 April 30). *Press Release.* Retrieved from a stakeholder email.

Hospitality Newfoundland and Labrador. (2015, April). *Star grading statistics for accommodations.* An internal document provided by email to support the project analysis.

Hospitality Newfoundland and Labrador. (2015, March). *Vision 2020 target.* Document provided by Adventure Central Newfoundland.

Hospitality Newfoundland & Labrador. (2014). *Tourism assurance plan.* An information document.

Hospitality Newfoundland & Labrador. (2013, April). *Tourism assurance plan.* A powerpoint presentation provided by HNL.

Hospitality Newfoundland & Labrador. (2013). *Business retention & expansion (BR&E): Accelerated market readiness (AMR) program.* A document provided by HNL.

Intervale Associates, Inc. (2006, October). *The way forward for the tourism outfitting industry in Newfoundland and Labrador.* Document provided by Destination Labrador.

Keel-Ryan, J. (2014, November). *Tourism Experiences: A world of opportunities.* A key-note address at the Northern Ontario Tourism Summit.

Matthews, M. (2013, September). *C-NLOPB draft Western NL offshore area strategic environmental assessment update report.* Internal letter to Premier Dunderdale by the Chair of the Western Destination Marketing Organization.

Memorial University of Newfoundland. (n.d.). *Powerpoint presentation.* Document provided by the Memorial University of Newfoundland Fisheries and Marine Institute.

Morrisey, J. (2007, May). *Central traffic counts, district 3, 2007.* Document provided by the Western Destination Marketing Organization.

Murphy, I. & Neis, B. (no date). *Navigating the legislative requirements for fisheries-tourism initiatives in Newfoundland and Labrador.* A regulations report. Document provided by the NL Department of Tourism, Culture and Recreation.

Newfoundland Arts Council. (2009, January). *An analysis of opportunities to increase private sector funding to Newfoundland and Labrador's arts and heritage sector NL*. Document provided by the NL Department of Tourism, Culture and Recreation.

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

Parsons, P. & Fennelly, J. (2010, May). *An analysis of major festivals in Newfoundland and Labrador in 2009 final report*. Document provided by the NL Department of Tourism, Culture and Recreation.

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

Stoddart, M. & Catano, G. (2015). *Puffing, kayaks and oil rigs: Shifting modes of society-environment integration on the Newfoundland coast.* Memorial University, NL.

The Community-University Research for Recovery Alliance, Memorial's Leslie Harris Centre, & Newfoundland & Labrador Regional Economic Development Association. (2012). *Working better together workshop report.* Document provided by the NL Department of Tourism, Culture and Recreation.

Tourism Quality Assurance of Newfoundland and Labrador. (2015, Mar). *Program expansion proposal 2015 - 2015.* A document provided by HNL.

Tract Consulting Inc. (2008). *Winter tourism strategy Newfoundland & Labrador.* Document provided by the NL Department of Tourism, Culture and Recreation.

Tract Consulting Inc. (2004, August). *Master plan for lighthouse development: Final edition. (Vol 2).* Document provided by the Western Destination Marketing Organization.

Unknown, (2008, January). *Traffic maps.* Document provided by the Western Destination Marketing Organization.

CENTRAL REGION COMMUNITY & BUSINESS DOCUMENTS

Adventure Central Newfoundland. (2014, March). *Adventure Central Newfoundland strategic economic plan 2014-2017.* Document provided by the Adventure Central Newfoundland.

Adventure Central Newfoundland. (2010).*Travel Guide 2010.* Retrieved from: http://www.centralnewfoundland.com/Adventure_Central_Newfoundland_2010_Travel_Guide.pdf

Barrett, P. (2012, January). *Beothuk Institute Inc. (successor to the Beothuk Institution founded by William Epps Cormack 1827).* Document provided by Adventure Central Newfoundland.

Broad Reach Strategies. (2013, February).*Twillingate New World Island strategic tourism expansion program – Sustainable community tourism plan – Final report.* Document provided by Adventure Central Newfoundland.

Coast of Bays. (2011, June). *Coast of Bays strategic economic plan 2011-2014.* Document provided by Adventure Central Newfoundland.

Collier, C. (2011, December). *Coast of Bays Corporation work plan 2011-2012.* Document provided by Adventure Central Newfoundland.

D.W. Knight Associates & TCI Management Consultants. (2014, August). *Miawpukek economic diversification strategy – final report.* Document provided by Adventure Central Newfoundland.

Edison, R. (2015, April). New hotel chain coming to Grand Falls – Windsor. *The Telegram.* Retrieved from http://www.thetelegram.com/News/Local/2015-04-20/article-4118088/New-hotel-chain-coming-to-Grand-Falls-Windsor/1

Fogo Island Inn. (n.d.) *Features and services.* Document provided by Adventure Central Newfoundland.

Gander International Airport Authority. (2015). *Economic impact study measures airport's output.* Retrieved from http://www.ganderairport.com/article/gander-airport-a-significant-engine/

Gander International Airport Authority. (2014, June). *Honored at ACI-NA award for excellence.* Retrieved from http://www.ganderairport.com/article/gander-airport-receives-three-marketing-awards/

Gander International Airport Authority. (2014). *2014 Annual report.* Retrieved from http://www.ganderairport.com/wp-content/uploads/2015/05/GIAA-2014-Annual-Report.pdf

Glovertown Town Council. (n.d.) *Economic Development Committee – EDO work plan 2011-12.* Document provided by Glovertown Town Council Economic Development Committee.

Government of Newfoundland and Labrador. (2015, July 15). *New Central region facilities 2014 and 2015.* Document provided by the Government of Newfoundland Department of Innovation, Business and Rural Development.

Government of Newfoundland and Labrador. (2015, May). *Occupancy rates for the central region 2003-2014.* Document provided by the Government of Newfoundland Department of Innovation, Business and Rural Development.

Government of Newfoundland and Labrador. (2015, May). *Packages 2014.* Document provided by the Government of Newfoundland Department of Innovation, Business and Rural Development.

Government of Newfoundland and Labrador. (2014, May). *Shoulder extension workshop: event planning discussion – sustainable tourism expansion project (STEP) committee.* Document provided by the Government of Newfoundland Department of Innovation, Business and Rural Development.

Government of Newfoundland and Labrador (2013). *Occupancy stats by star level.* Document provided by the Government of Newfoundland Department of Innovation, Business and Rural Development.

Government of Newfoundland & Labrador. (2013). *Fogo island ferry statistics 2008 - 2012.* A document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland and Labrador. (2013, January). *Business retention & expansion (BR&E): Accelerated market readiness (AMR) program.* Document provided by the Government of Newfoundland and Labrador Department of Innovation, Business and Rural Development.

Grand Falls-Windsor Heritage Society. (2011, July). *Strategic planning, session 1 – follow up A.* Document provided by Adventure Central Newfoundland.

Hartmann, W. Personal Communication. (2015, January). Document provided by Adventure Central Newfoundland.

Holly, Donald Jr. (1997). *An archaeological survey of Fogo Island, Newfoundland, 1997.* A document provided by Adventure Central.

Howse, T. (n.d). *Miawpukek First Nation proposal to develop a multi-year economic diversification strategy.* Document provided by Miawpukek First Nations Director of Training and Economic Development.

InterVISTAS. (2014, September). *Gander International Airport –Economic impact study (final report).* Retrieved from http://www.ganderairport.com/wp-content/uploads/2014/11/YQX-Economic-Impact-Study-11Sept2014-FINAL-REPORT.pdf

ItSticks Inc. (2012, November). *Tourism strategy for Centreville-Wareham-Trinity: Supporting business in the BonaVvista North Region.* Document provided by Adventure Central Newfoundland.

James Floyd Associates (2006). *Tourism strategy for the Emerald Zone.* A word document with the cover pages of this report provided by community stakeholder David Hayashida. The entire report was not provided, therefore the contents could not be assessed.

Kittiwake Economic Development Corporation. (2012, November). *Twillingate New World Island 2012 visitor survey – summary of results.* Document provided be Adventure Central Newfoundland.

Kittiwake Economic Development Corporation. (2011, October). *Socio-economic strategic plan* – town of Fogo Island Part 1. Document provided by Adventure Central Newfoundland.

Kittiwake Economic Development Corporation. (2011, October). *Socio-economic strategic plan* – town of Fogo Island Part 2. Document provided by Adventure Central Newfoundland.

Leonardo. (2015 Mar 24). *5 ways to leverage the hidden benefits of online reviews.* Retrieved from: http://blog.leonardo.com/author/admin/

Maiwpukek Mi'kamawey Mawi'omi (2014, Fall). *2014 Miawpukek tourism development strategy (draft).* Document provided by Maiwpukek Mi'kamawey Mawi'omi Department of Training and Economic Development.

Memorial University. (u.k.). *Fisheries and marine institute.* A document provided by Adventure Central.

Moores, L., Noble, M. (2014, September). *Non tap compliant companies in central region.* Document provided by Adventure Central Newfoundland.

Salvage: Fish stages museum (2003). Document provided by Adventure Central Newfoundland.

Tract Consulting. (2012, May). *Education and training needs assessment of NL – Recreational boating sector.* Document provided by Adventure Central Newfoundland.

Tuck, C. (2015, February). Personal Communication. Document provided by Adventure Central Newfoundland.

Twillingate Islands Tourism Association. (2011, September). *Sustainability plan for operations of the Long Point Lighthouse.* Document provided by Adventure Central Newfoundland.

Twillingate Islands Tourism Association Inc. (2009, July). *Adaptive reuse of Long Point Lighthouse – residence & landscape.* Document provided by Adventure Central Newfoundland.

Unknown. (n.d.). Information on tourism assets for the Coast of Bays. Document provided by Adventure Central Newfoundland.

Vey, G. R. (2011, November). *Letter to Minister French*. Document provided by the Gander Airport Authority.

Whey Consulting. (2010, March). Town of New-Wes-Valley integrated community sustainability plan 2010-2014. Document provided by Adventure Central Newfoundland.

CENTRAL REGION POTENTIAL PROJECTS IN THE PIPELINE

Angelopoulos, J. (2015, February). *Crown land applications.* Document provided by Adventure Central Newfoundland.

Art EX. (2014). Art Ex strategic plan 2014-2019 – draft. Document provided by Adventure Central Newfoundland.

Baie Verte Peninsula Multiuse Port Committee. (2013, January). *Request for proposals – Baie Verte Peninsula multi-use port* *scoping study.* Document provided by Adventure Central Newfoundland.

Botwood Mural Arts Society. (n.d.). *Mural arts interpretation in Botwood.* Document provided by Adventure Central Newfoundland.

Bouzane Consulting Inc. (2013, June). *Viability assessment- Rita Love memorial kitchen.* Document provided by Adventure Central Newfoundland.

Design Management Group Ltd & D.W. Knight Associates. (2010, June). *MFN tourism development strategy 2010 final report.* Document provided by Adventure Central Newfoundland.

Design Management Group Ltd & D.W. Knight Associates. (2010, May). *MFN tourism development strategy 2010 – draft report.* Document provided by the Adventure Central Newfoundland.

Drover, Randy. (2014). *Request for proposal: Bishop's Falls Exploits River Development Strategy.* Town of Bishop Falls.

Elton Management Consulting, & Jane Helleur & Associates Inc. (2010, August). *Business plan – Cape Freels Heritage Trust.* Document provided by Adventure Central Newfoundland.

Fogo Island Tourism. (2015, February). *Fogo Island tourism update.* Document provided by Adventure Central Newfoundland.

Falk, N. (2014, April). *The Botwood c*ultural *tourism expansion project.* Document provided by Adventure Central Newfoundland.

Farrell and Associates. (2013, August). *Eastport Peninsula Heritage Society – A framework for sustainability.* Document provided by the Western Destination Marketing Company.

Isles Wooden Boat Building Committees. (n.d.) *Isles wooden boat business plan.* Document provided by Adventure Central Newfoundland.

Macaulay, M. (2009, July). *Boyd's Cove Beothuk interpretation centre provincial historic site – Interpretation plan.* Document provided by Adventure Central Newfoundland.

Newfoundland T'Railway Council. 2014, October). *A proposal to protect, upgrade and improve the Newfoundland T'Railway.*Document provided by Adventure Central Newfoundland.

NorthEast Church Heritage Association Inc. (2015, January). *Modernization of Twillingate Performing Arts Centre.* Document provided by Adventure Central Newfoundland.

North Atlantic Aviation Museum. (n.d.) *Ferry command memorial hall.* Document provided Adventure Central Newfoundland.

Phillips, Richard. (2015). *Project in the pipeline.* A personal email to Caroline Swan of Adventure Central describing a project in the pipeline for consideration in the TDVAA Central Region.

Planning Resources Inc. (2010, January). *Mi'kmaq discovery centre business plan – Final report.* Document provided by Adventure Central Newfoundland.

Scott, A. (2014, October). *Projects in the pipeline.* Document provided by Adventure Central Newfoundland.

The Change Islands Newfoundland Pony Refuge. (2014, April). *Business plan.* Document provided by Adventure Central Newfoundland.

Town of Gander. (2014, December). *Strategic plan2 015-2019.*Document retrieved from http://www.gandercanada.com/images/stories/pdfs/StratPlan15-19.pdf

Town of Sandy Cove. (2014, October). *Funding proposal for Crooked Tree Park walking trail Sandy Cove, NL.* Document provided by Adventure Central Newfoundland.

Tract Consulting Inc. (2015, March). *Town of Bishop Falls - Exploits River development strategy.* A document provided by a community stakeholder.

Unknown. (2014). *2014 Planning session*. Document provided by Adventure Central Newfoundland.

Unknown. (2014, March). *Strategic directions for tourism and heritage- Botwood roundtable meeting notes.* Document provided by Adventure Central Newfoundland.

Unknown. (n.d.) *Opportunities for adventure and experiential tourism in Red Indian Lake.* Document provided by Adventure Central Newfoundland.

Wilma Hartmann: (2015, March 13). Unscripted: A Digital Arts Festival in Twillingate NWI.

Appendix 4: Vision 2020 Alignment Summary

There are seven areas of investment with 16 goal categories in the *Vision 2020* (Table 63). The alignment of each of the 16 major findings from this study is identified in Table 64.

Table 63: *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 64: Central Region's *Vision 2020* TDVAA Labrador Recommendations Alignment

Finding	*Leadership*	*Transport*	*Research*	*Product/ Experience*	*Technology*	*Marketing*	*HR*	*Core*
1				4.1		6.3	7.2	
2						6.1		
3		2.2	3.1	4.1, 4.2			7.1	
4			3.1	4.1		6.2		
5		2.1, 2.2		4.2		6.1, 6.2		
6				4.1			7.2	
7				4.2, 4.3				
8				4.1		6.1, 6.2	7.1	
9	1.3		3.1	4.1			7.1	
10				4.1	5.1	6.3		
11	1.3			4.1		6.1, 6.2		
12					5.1	6.1	7.2	
13				4.1, 4.3		6.2		
14	1.3						7.1	
15			3.1					
16								X