

# *Gros Morne Region Strategic Tourism Plan*

Strategic Tourism for Areas and Regions (STAR) Pilot Project

**Submitted: November 23, 2016**

*The Gros Morne Regional Tourism  
Working Committee*

by

Tourism Synergy Ltd. and Broad Reach Strategies



## *Acknowledgements*

### ***Thanks go to the Working Committee and Stakeholders Gros Morne Region Strategic Tourism Plan***

Special thanks to the members of the Working Committee and the tourism stakeholders who devoted time and input to the Plan's preparation.

#### **Working Committee**

<b>Name</b>	<b>Organization/Business</b>
Raymond Cusson	Gros Morne Cooperating Association
Gareth Mitton	Whatbox Creative
Shirley Montague	Trails, Tales and Tunes (Creative/Cultural)
Sue Rendell	Gros Morne Adventures
Glenda Reid Bavis	Gros Morne Fall Festival/ Dr. Henry N. Payne Community Museum & Craft Shop
Todd Wight	Ocean View Hotel
Carla Wheaton	Parks Canada

Former Mayor of Woody Point, Ken Thomas was a member of the initial Working Committee. Special thanks go to the Gros Morne Cooperating Association for administering the project and coordinating communications and meetings.

It is also important to appreciate the contributions of organizations and individuals who have been integral to the process. Together they weave the Gros Morne region into a strong and compelling tourism fabric in Western Newfoundland and Labrador. Each has contributed to development of this Report and its recommendations; they are:

- Tourism operators, stakeholders and interested residents
- The communities who support tourism efforts
- GMNP, the key motivator for area visitation of 200,000+ people annually, has been integral to the process
- Gros Morne Institute for Sustainable Tourism
- The non-profit organizations and groups who offer up signature festivals and experiences for visitors
- Key government partners at all levels.

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## **Executive Summary**

### **Gros Morne Region Strategic Tourism Plan**

As the most compelling rural travel destination in Newfoundland and Labrador, the Gros Morne Region has earned its reputation as a majestic and extraordinary landscape, a recognized cultural and festival center and a tourism leader in Atlantic Canada. The Gros Morne Region recognizes that a focused, regional undertaking and collective effort will move Gros Morne to stronger national and international destination prominence. Therefore, the region has embarked on the development of its first **Regional Strategic Tourism Plan**.

This **Gros Morne Region Strategic Tourism Plan** outlines a 10-year Tourism Vision for the region. An aligned 5-year Goal is identified, along with eight (8) Strategic Recommendations, each of which has clearly defined tactics, timelines and budgets. The **Gros Morne Tourism Asset Inventory** is an important companion document. The plan is rooted in significant consultation, including with regional tourism industry, stakeholders, partners and residents, as well as research, trends, market analysis and best practice review.

The **Gros Morne Region Strategic Tourism Plan** is the result of a new Atlantic Canada program, *Strategic Tourism for Areas and Regions* (STAR) spearheaded by ACOA-Tourism Atlantic. The project proponent, Gros Morne Cooperating Association (GMCA), engaged the services of Tourism Synergy Ltd (Dr. Laurel Reid) and Broad Reach Strategies Ltd (Marsha Pond) to develop the STAR Program and the Gros Morne plan.

## **The Plan – Going Forward**

### **Vision for Tourism**

As an over-arching guide to the Plan, the Vision for Tourism in the region is drawn from existing strategies and consultations.

#### **DRAFT 10-Year GM Tourism VISION (to 2027)**

*Gros Morne Region is internationally sought after as an iconic Canadian travel destination where spectacular nature, cultural expression and authenticity are interwoven to enrich the lives of visitors and residents.*

## Guiding Principles of the Plan

The Gros Morne Region Strategic Tourism Plan:

- Identifies new initiatives as well as tactics that add value to key Gros Morne planning efforts and initiatives already underway.
- Helps integrate and communicate development efforts.
- Aligns with the pillars of Sustainability: 1. respect for the environment, 2. financial viability, and 3. social and cultural well-being.
- Recognizes that GMNP is the key driver and motivator for visitation to the area, and indeed western Newfoundland.
- Recognizes GMNP and GMCA as key players in leading regional collaboration to support, enhance and benefit from the shared tourism Vision and Goal.
- Strive for healthy and successful enclave communities as basis for regional strength.
- Acknowledge business development and entrepreneurship as critical elements in fueling successful tourism growth.

## Goal of the GM Region Strategic Tourism Plan

The Plan articulates a 5-year Goal for Tourism.

### 5-Year GOAL GM Region Strategic Tourism Plan

By 2021, Gros Morne Region is THE most renowned destination in Atlantic Canada. It will achieve this choice destination status by:

1. Delivering customer focused experiences;
2. Advancing strategic tourism development and business principles, and
3. Best practice collaboration among public and private partners locally, nationally and internationally.

## Strategic Recommendations and Tactics

The Plan identifies eight (8) Strategic Recommendations required over the next 5 years to bring the Goal, and ultimately the Vision, to reality.

### **Recommendation 1: Validate and endorse the Tourism Vision and Goal and “live them” to the benefit all visitors as well as the regional and provincial economy**

- Conduct a Visioning Workshop in 2018 with all key tourism and community members to “look into the future” with resulting actions identified

### **Recommendation 2: Create an industry-driven, regional Tourism Coordinating Team by fall 2017, with support from an individual identified to perform the job and functions of a Tourism Specialist no later than January 2018**

- Create a regional Tourism Coordinating Team (TCT) to “own the Plan” and share in making it successful

- Use existing resources of GMNP and GMCA to perform the job and functions of a full-time Tourism Specialist responsible for supporting the TCT and enhancing online marketing
- Create and use as a priorities' guide, an annual *Tourism Action Framework* reflecting regional efforts beginning in 2016 (sample included in Plan).
- Endorse and promote a *GM Commitment of our Guests*, a regional statement of intent to grow with tourism by fall 2017 (sample included in Plan).
- Work with Parks Canada on a business case for improved cell service.
- Forge collaborations and partnerships with those who could help alleviate human resource pressures and/or provide training assistance to regional businesses, volunteers and community groups.

**Recommendation 3: Communicate, cooperate and partner among regional stakeholders in relevant and profitable ways suggested in the Plan, by committing to an annual regional Tourism Forum beginning in November 2016, and systemic networking efforts to ensure a strong culture of communication.**

- Share and promote the Plan
- Host in November annually, a *Tourism Forum* to encourage a free flow of two-way communication to operators, stakeholders, partners and communities
- Use [www.visitgrosmorne.com](http://www.visitgrosmorne.com) Calendar of Events as tool for ongoing activities and experiences in the region
- Continue existing meetings for specific projects, reporting outcomes to TCT and at the Tourism Forum.

**Recommendation 4: Build evolving, and meaningful tourism experiences region-wide, by optimizing available industry education resources and market-readiness tools to extend visitor stays and increase expenditures.**

- GMIST will develop and host annually in the spring, an *Experience Refresher Workshop* for new and non-profit experience providers beginning in spring 2017
- Encourage revival and offering of key courses of dormant cultural programs formerly offered by Bonavista Institute for Cultural Tourism
- Conduct Accelerated Marketing Readiness (AMR) Programs for 10 operators at a time, Beginning in summer 2017 and recurring annually
- By 2018, GMIST offers and pilots in Gros Morne Region a new, advanced *Elite Edgies* Program for “graduates” of Edge of the Wedge
- Immediately engage with Memorial University to optimize opportunities with Bonne Pay Marine Station
- From 2017 to 2019 work to become the first “World Host Certified” region in Atlantic Canada
- Give priority attention to experience development and market-readiness associated with Culinary and Cultural Experiences.

**Recommendation 5: Recognize tourism-related environmental practices as: 1. valuable and profitable for tourism growth, and, 2. as a way of competitively positioning the destination -- in line with the regional Vision, Parks Canada's philosophy and Gros Morne destination status as a UNESCO World Heritage site.**

- In 2018, survey regional tourism operators, businesses, institutions, municipalities and organizations to understand the current situation regarding environmental practices
- Based upon Survey results and using Parks Canada environmental guidelines consider appropriate programs or program adjustments.

**Recommendation 6: Extend the tourism season, by planning strategically, beginning with a Fall 2016 workshop aimed at extending June and September periods.**

- Conduct a *Season Extension Symposium: HR Challenges Focus* to generate recommendations and endorse a Season Extension/HR approach moving forward.

**Recommendation 7: Continue to market the region as a single destination; dedicate additional human and financial resources and a prioritized work plan to focus on online tactics and brand development.**

- Empower TCT as the “voice” for regional marketing advice and collaboration
- Tourism Specialist develops and implements a hands-on work plan to enhance the region's online efforts to ensure the region is appropriately and consistently represented online
- Generate a business case and funding formula (from the on-line workplan) for local investment to enhance the destination presence online; targeting investment to the value of \$5,000 for 2018-2019.
- Leverage the power of [www.newfoundlandlabrador.com](http://www.newfoundlandlabrador.com) wherever possible
- Strengthen and optimize marketing partnerships with VOBB and Old Crow Magazine
- Consolidate and use key marketing messages across the board and undertake a Branding effort by 2019.

**Recommendation 8: Monitor progress and report results in specific ways suggested in the plan to measure the effectiveness of the Plan's recommendations.**

- By fall 2016, finalize success measures and metrics suggested in the Plan by which progress can be evaluated and reported.

## **Estimated Costs and Timeline**

The five-year implementation timeline for the objectives/recommendations anticipates a budget requirement of approximately **\$12,117** for year one. Once all costing is complete, an annual budget of up to **\$26,019** is estimated to sustain the efforts outlined in the plan. These budget numbers assume Tourism Specialist funding, estimated at \$50,000 per year, comes from existing sources.

## Conclusion

The Gros Morne Region has the potential to be a leading destination in Canada; collaboration among Gros Morne National Park, GMCA, industry operators, community organizations and residents will contribute to make this happen. The collaborative implementation of the Gros Morne Region Strategic Tourism Plan will ensure achievable and profitable results as well as sustainability for tourism in the area in future years.

# Introduction

This document is positioned as a **five-year Region Strategic Tourism Plan** (to 2021) that aligns with the NL Vision 2020 and offers a Vision for Gros Morne that extends over 10 years (to 2027).

As the most compelling and iconic travel destination in Newfoundland and Labrador and a key one in Atlantic Canada, the Gros Morne region has extensive tourism potential. With a population of 3,500 and seven (7) distinct enclave communities<sup>1</sup> within Gros Morne National Park, the region possesses a wealth of tourism leadership, experience and powerful partnerships, continually striving to polish its tourism offers and push the envelope.

With a newly articulated regional tourism Vision and Goal, the seven communities, Gros Morne Cooperating Association (GMCA) and Gros Morne National Park have banded together to develop a **Gros Morne (GM) Region Strategic Tourism Plan**.

The GM Region is benefiting from the resources made available through a new tourism development project, **STAR** (*Strategic Tourism for Areas and Regions*), to shape and build the plan. STAR is a pilot project spear-headed by ACOA-Tourism Atlantic for developing regional tourism. Once developed, STAR will have application in other regions in Atlantic Canada. The Gros Morne pilot project of STAR takes place over a year — November 2015 to November 2016. The consulting team of Tourism Synergy Ltd. (Dr. Laurel Reid) and Broad Reach Strategies Ltd. (Marsha Pond) has been engaged with this process from the beginning.

This *GM Region Strategic Tourism Plan* is dynamic and is crafted for review by the proponent GMCA, by the project Working Committee and by communities at large, and includes:

- An Environmental Scan,
- Comprehensive Market Profile,
- Results from various consultation efforts,
- Tourism Vision for GM Region (10 years +)
- Goal for the GM Region Strategic Tourism Plan (5 years)
- Strategic Recommendations and tactics.

An ***Inventory of Regional Assets*** (March 2016) is a companion document and has been developed with stakeholder input.

The Strategic Tourism Plan for the Gros Morne Region is the first in Atlantic Canada under the newly-minted ***Strategic Tourism for Areas and Regions (STAR)*** Program developed by ACOA-Tourism Atlantic.

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<sup>1</sup> The seven enclave communities are: Woody Point, Glenburnie/Birchy Head/Shoal Brook, Trout River, Rocky Harbour, Norris Point, Cow Head and St. Paul's.

## Project Purpose & Objectives

The **Purpose** of the Project was two-fold:

1. Research, develop and deliver a new STAR program resulting in a measurable, long-term strategic 5-year tourism plan for the Gros Morne (GM) region, which:
  - Presents the GM tourism vision, environment and projections,
  - Aligns with Atlantic and provincial tourism strategies,
  - Helps realize the potential outlined in the Western Region Destination Development Plan, and
  - Incorporates the local work in progress through the Gros Morne Cooperating Association (GMCA) and other relevant plans.
2. Refine, develop and design relevant activities, tools, processes and elements required to offer the STAR program to other Atlantic Canada regions.

Specific project objectives were to:

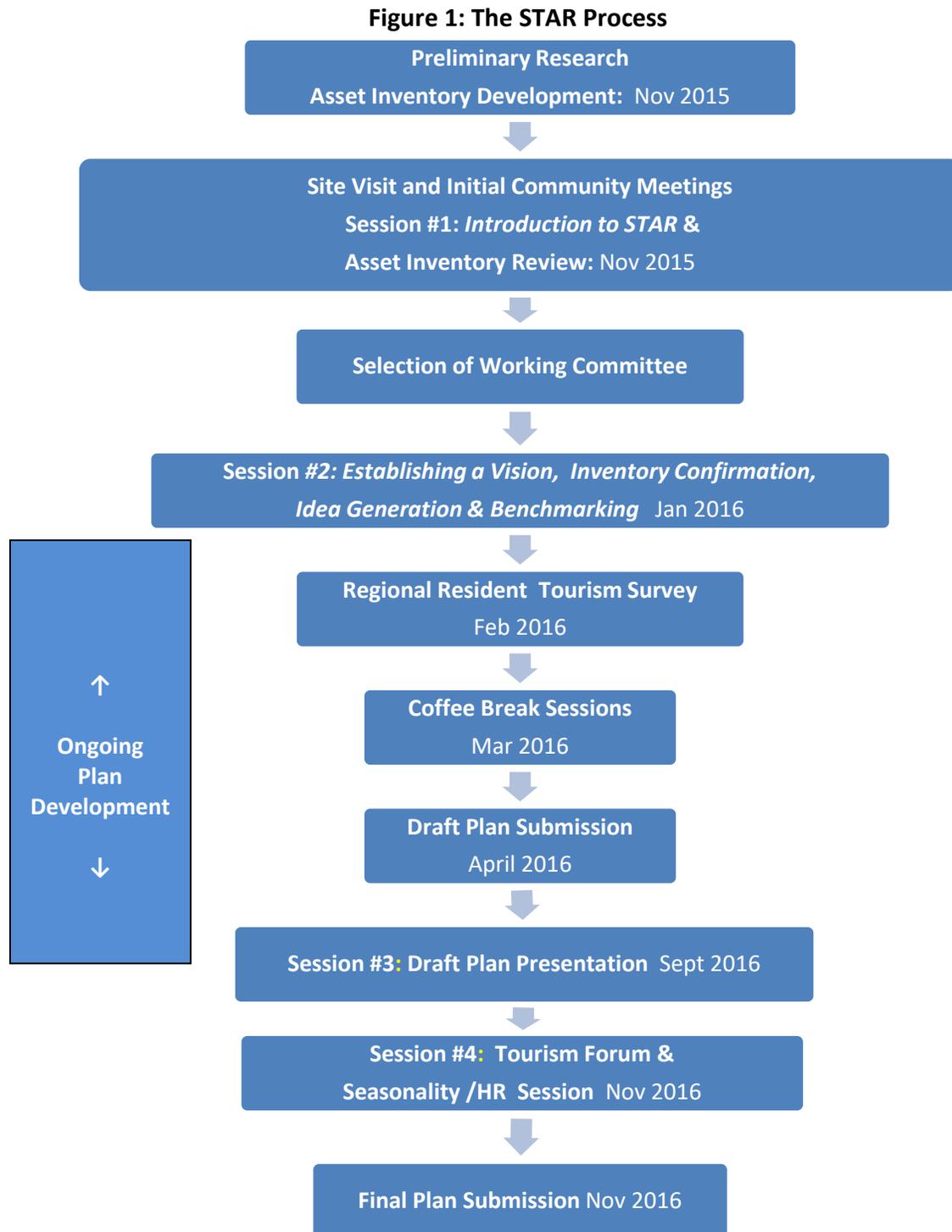
1. Pilot the STAR program in Gros Morne within a 12-month period,
2. Inspire and empower the broader tourism community in the Gros Morne area to strategize, develop, resource and execute a Regional Strategic Tourism Plan,
3. Review, update and design tools and approaches to STAR and document program processes,
4. Help program participants better understand the steps in regional tourism destination development,
5. Establish Gros Morne's current tourism baseline situation,
6. Nurture the tools and knowledge required for local tourism stakeholders to create experiential products,
7. Engage regional communities in the process, working with a Steering Committee and network of leaders and stakeholders who execute the plan,
8. Educate and provide skills training to build capacity in the community,
9. Develop an actionable STAR Strategic Tourism Plan,
10. Set up a system to monitor and measure the success of the plan.

The STAR process in Gros Morne region focuses on:

- Strategic planning
- Building tourism capacity
- Experiential product development, and
- Achievable implementation and measurement.

## The STAR Process (at Nov 2016)

The STAR Process used for Gros Morne is shown in **Figure 1**.



## Environmental Scan

Gros Morne (GM) Region is a mature and complex tourism area, comprised of a cross section of operators, businesses, visitor experiences and communities at various levels of development. As outlined in the diagram of the STAR Process, stakeholder consultations took many forms and resulted in key information that forms the tourism landscape – the environment—around which this plan is built. The Environmental Scan outlined here encompasses the internal and external factors which help mold the Plan’s recommendations.

This regional Strategic Tourism Plan is distinct from GMNP plans and GMCA’s priorities. It is designed to add value to both and complement existing plans as well as those of the enclave communities.

### ● *Overarching Issues and Considerations*

In scanning the landscape, several overarching issues and considerations influenced the Plan’s approach and recommendations. They are:

- **Gros Morne National Park (GMNP) provides the region with a high level of recognition and focused resources, which most tourism areas envy.** With more than 207,000 annual visitors, the park is the key driver for non-resident visitation and revenue to Western NL and a primary demand generator for the province. Resourced and well-staffed by Parks Canada, GMNP has: a) signature status among national parks, b) a level of visitor information that is of value to the region, and c) proven commitment to growing visitation.
- **The GM Region has powerful partners and allies.** Gros Morne National Park, the Gros Morne Cooperating Association (GMCA), Memorial University of Newfoundland and the Gros Morne Institute for Sustainable Tourism (GMIST) offer the region tourism growth opportunities unsurpassed in Atlantic Canada.
  - **Gros Morne National Park has international stature as an iconic tourism destination** and as a UNESCO World Heritage site. GMNP is an environmental steward and has expertise and experience with tourism development and visitation.
  - **The GMCA has earned a reputation as an effective and creative regional facilitator** for projects and funding and is a major player in tourism promotion ([www.visitgrosmorne.com](http://www.visitgrosmorne.com)), many visitor tactics and experiences. The association’s best practice status facilitates funding dollars for the region; it is estimated that GMCA has generated almost \$30million in external investment into projects for enclave communities during the past 20 years.

- **Memorial University’s investment in the Bonne Bay Marine Station (BBMS) is extensive** and has potential to add brand-consistent, visitor opportunities to the tourism mix; it opens opportunities to grow a more youth oriented market base and signature experiences. Leadership at BBMS is in flux (2016) and it is important for tourism that this prime, waterfront resource be a priority.
  - **GMIST is recognized as one of Canada’s top tourism experience development specialists** and has the tools/ potential tools to help enhance GM signature experiences and build additional capacity within the region. Further development of GMIST is symbiotically beneficial to GM.
- **The GM Region has high tourism expectations.** The Region is distinctive in many ways: i. Canadian and international recognition; ii. the leadership from which it benefits; and iii. the resources available to advance tourism efforts. The region demonstrates tourism energy, momentum and new business investment; residents are engaged and view tourism as an economic sector.
- **The notion of “customer focus” is understood here.** For the most part tourism stakeholders appreciate that a regional focus through visitors’ eyes will breed long term success. Communities in the region are very self-aware and acknowledge that greater regional awareness is required.
- **There are solid plans in play for growth -- important foundations for a regional plan.** Guiding documents include:
- Gros Morne National Park Mission and plans
  - Gros Morne *Cultural Blueprint* with an articulated vision and cultural development projects and successes and the *National Stakeholder Strategy*
  - Western Region, Destination Development Plan
  - Community municipal plans and development plans
- **The region benefits from a wealth of assets and infrastructure** that can continue to be put to work for tourism.
- Despite numerous efforts, **seasonal tourism and staffing continues to be a challenge**, limiting opportunities for growth.
- **The fiscal situation in NL cannot be ignored.** While visitation in GM region is robust today, there is lagging confidence in the provincial economy and concerns that the tourism sector will need to grapple with budget tightening from government in future. The GM Region must acknowledge this reality and ensure that partnerships and funding requests are more strategic than ever and benefit the entire region.
- **The Canadian tourism labour shortage in rural and resort areas is well documented.** This pervasive challenge affects business and destination growth and as also strongly affects all-important volunteer efforts. This threat to the Gros Morne region, including urbanization and an aging population, will continue to put significant pressure on GM’s ability to sustain its distinctive cultural activity, festivals and programs.
- **The effect of climate change cannot be ignored.** Coastal destinations in particular are vulnerable to rising sea levels, dramatic weather shifts/conditions, coastal erosion as well as melting of snow and glaciers (icebergs) resulting in a shift in destination demand. And when tourism is a major economic activity, as it is in Gros Morne, any significant reduction in

tourist arrivals will have serious employment impacts. There is need for research on how these elements might affect the tourism industry which could be done by and/or in partnership with the Bonne Bay Marine Centre, MUN/Grenfell Department of Environmental Policy, the Atlantic Climate Change Adaptation Solutions Associations, and/or Natural Resources Canada.

## ● Trends

Several trends align with consensus of information on visitor demands shaping the travel landscape. *TripAdvisor* is one of the most pervasive travel influencers of the 21<sup>st</sup> century. These projections combine with global trends and issues influencing travel for 2017.

**Table 1: Travel Trends and Issues<sup>2</sup>**

### ***Trip Advisor Trends***

- **New Experiences:** Travelers of all ages continue to seek experiences they haven't tried before
- **Spending and Value for \$\$:** They are prepared to spend more for experiences that they feel are "worth it" to themselves and their families
- **Destination Choice:** Travelers choose destinations because of culture and people, and to take in special offers
- **Amenities:** Wi-Fi and air conditioning in warm climates stand out as must-have amenities
- **Industry Confidence:** Internationally, 3 out of 4 business operators are optimistic about profits in 2016
- **Online Presence:** is still critical; more and more businesses are paying attention to what their guests/ visitors are saying online in order to manage brands and reputations.

Source: *TripAdvisor*, Ipsos Research, 2016

### ***Ten Important World Tourism Issues for 2017***

1. Importance of maintaining a destination's sustainability regarding social, cultural, natural and built resources
2. Concerns for safety and security remains an important issue for the travel and tourism industry
3. Impact on the travel and tourism industry resulting from the global economic perspective
4. Responding to increased interest in potential long-term consequences of climate change impacts on tourism
5. Necessity for increased local/regional/national leadership in tourism policy and strategic planning
6. Educating users about optimizing the application of new technologies in the tourism industry
7. Resolving barriers to travel: visas, passports, airline services, fees, and delays
8. Understanding the transformative effect that tourism has on global socio-economic progress
9. Effect on travel and tourism from natural/human-induced disasters, health issues, and political disruptions
10. Changes in tourism demand resulting from increased travel by emerging nations.

<sup>2</sup> *TripAdvisor, TripBarometer* (December 2015): "6 key travel trends for 2016, resulting from "conversations" with 44,000 travelers and hoteliers conducted by independent research firm Ipsos. Trends: Dr. David Edgell Sr., East Carolina University, charter member of the International Academy for the Study of Tourism.

## ● **Appreciating GM Community Priorities**

The interest and community engagement in tourism and the STAR process in Gros Morne is high. In January, 29 operators and residents traveled to an interactive session to establish initial tourism priorities for Gros Morne (Table 2). Additional issues: ● transportation to and throughout the region; ● staffing, ● marketing, and ● the profile/ recognition of individual communities. A resident survey was conducted in early 2016; survey highlights are shown in **Appendix A**.

**Table 2: GM Stakeholder Priorities<sup>3</sup>**

**Six key priorities** surfaced as **most important** to participants:

1. **Environment and water management issues:** most important: i. protecting the natural environment, ii. community and business recycling efforts, and iii. green communities. Stakeholders felt that GM communities should strive to meet a higher environment standard than is currently the case.
2. **Communication** among communities, regional businesses and residents is critical; “talking to each other more often” would ultimately lead to valuable regional strategies.
3. **Regional cooperation** and building collective support for regional sustainability.
4. **Tourism season extension**, particularly extending the shoulder seasons was articulated.
5. **Infrastructure upgrades** by Parks Canada to GMNP are integral to growing market demand and visitor satisfaction.
6. **Enhanced experiences** for visitors, especially those rooted in natural attributes, are important for growth.

As a point of interest, consultations, discussions and research revealed unique points of differentiation — “claims to fame”-- among the enclave communities. These unique features can be used as a starting point for creation of a diversified “package” of experiences to encourage visitor spend and length of stay.

### **GM Communities -- Claims to Fame**

- **Cow Head** – Live Performance Centre of GM (GM Theatre Festival)
- **St. Paul’s** –Heart of Western NL Folklore (Broome Point)
- **Rocky Harbour** – GM Hub (Centre)
- **Norris Point** – Arts, Food, BBMS, TTT & VOBB
- **Woody Point** –Art, Music, signature festivals i.e. Writers’ Festival
- **GBS** – Back Country trail access (Pic a Tenerife Mountain)
- **Trout River** – Fiber Arts: *Socks on the Line* and *Passing the Time*

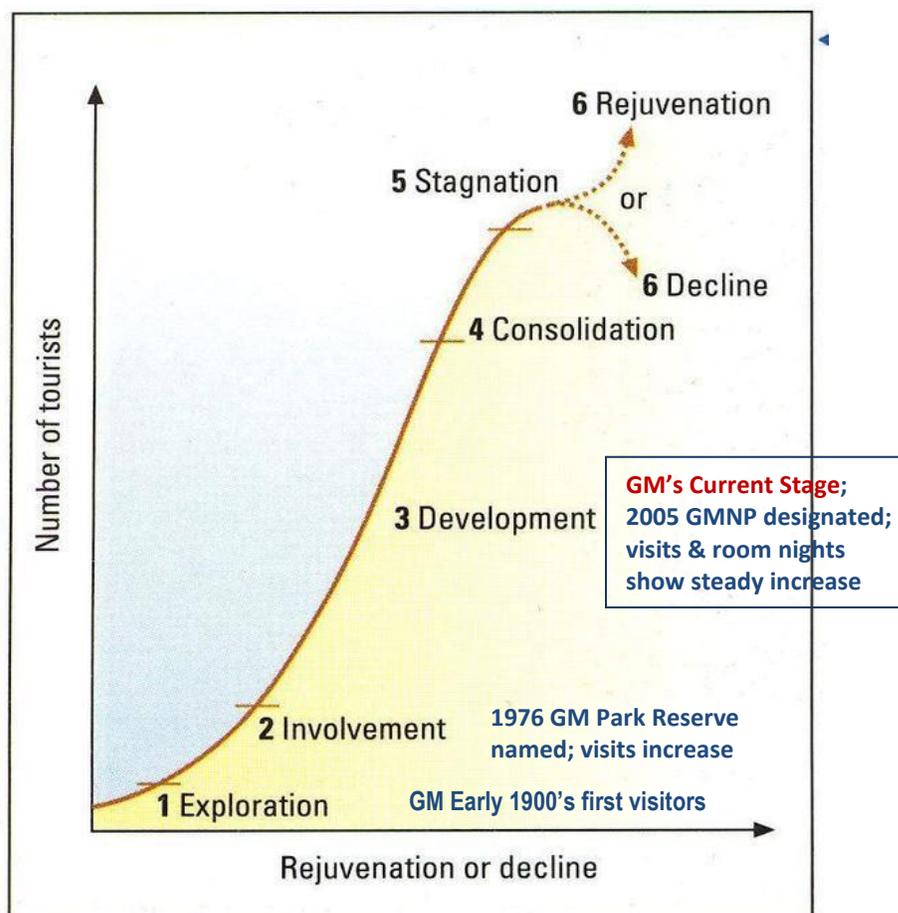
<sup>3</sup> Detailed results and priorities identified in *Session #2: Asset Inventory, Idea Generation and Benchmarking* held in January 2016 are available at <http://grosbornecoop.com/boost/>.

## ● Gros Morne and the Tourism Life Cycle

According to Butler's (1980) tourism area life cycle (TALC) a community/region can be at any stage of development from exploration/discovery to consolidation (**Figure 2**). Butler proposed that most tourism areas go through a six stage *tourism life cycle model*; starting on a very small scale and get bigger and bigger until stagnation occurs. There is a great deal of controversy about the model, including the time frame used; Butler did not specify the timeframe but it has been applied to many destinations existing over a 100- or more-year period (e.g. Blackpool, UK).

In summary, a tourism destination progresses from exploration/discovery, where it is relatively unknown and initially restricted by lack of resources, access, facilities, and local knowledge to growth, consolidation and beyond. As more people discover and visit the destination, word spreads and the destination's amenities are developed to the point where most destinations eventually reach a stage of consolidation, stagnation, and finally either rejuvenation or decline (Figure 1). The six stages are elaborated on in **Appendix B**. **Gros Morne is still in the Development stage of the TLC**. Information to support this assertion is shown in **Appendix B**.

**Figure 2: GM and The Butler Tourism Life Cycle Model**



## Best Practice Learnings

Three tourism best practices were profiled: Cavendish, PEI, Alma, NB and Banff AB. These destinations were chosen given their location in/adjacent to a National Park and, in Alma's case, familiarity with STEP (Strategic Tourism Expansion Program) as Alma went through the STEP process in 2011. Complete findings are shown in **Appendix C**.

### Key best practices and lessons learned include:

1. **Tourism Management:** Works best if there is a lead organization devoted to this task (Banff, Cavendish), with active stakeholders (e.g. members). All destinations expressed the need to increasingly work with Parks Canada and tourism stakeholders to find solutions to challenges.
2. **Tourism Plan:** All three destinations, Banff, Cavendish and Alma, expressed the need to have and to follow a plan. The plan might change based on opportunities, but there needs to be framework going forward.
3. **Vision, Goals:** Goals are required to support an articulated vision; again, they may change over time but goals are required so that achievements can be measured.
4. **Budget to Support the Plan:** An ongoing budget that supports the plan and core operations is necessary for continuity and ongoing success. Membership fees help support efforts and demonstrate operator "buy-in" (Banff, Cavendish). Funding is an ongoing challenge, but particularly for small communities with few resources (Alma).
5. **Tourism Plan Outcomes:** Banff: seeing year over year increases (10% in 2016; 7.5% in 2016), with promotional attempts aimed at shifting day trip visitors to shoulder seasons; Cavendish: increases: 4.5% in 2015, anecdotally a strong year for 2016. Alma: 25% increase this year over last; at capacity now (without Village improvements specified in plan).
6. **Marketing:** Heavy reliance on online channels, thus the importance of a current and relevant on-line presence (Banff and Cavendish). Alma going in this direction; Wifi was introduced into Fundy National Park in 2015.
7. **Brand Strategy** is critical and must be: 1. relevant to target markets, and 2. consistently used in all promotions (Banff, Cavendish).
8. **HR:** Funding for core position(s) is required to ensure continuity:
  - **Banff:** TIF (Tourism Improvement Fee) of 2% on lodgings; membership fees, cooperative advertising programs.
  - **Cavendish:** PEI government, membership fees, cooperative advertising programs.
  - **Alma:** Federal, Provincial, Municipal government for current Phased Village enhancement plan. Person hired by Town to manage project.
9. **Communication:** Communication and transparency engages members and benefits everyone, particularly if membership-based (Banff, Cavendish).
10. **Partnerships:** All destinations agree that partnerships are critical in getting things done – with tourism stakeholders, visitors and all levels of government
11. **Main Challenges:** All destinations are concerned about increased visitation and capacity for 2017 when National Parks entry will be free. Banff and Cavendish are seeking solutions identified by key stakeholders, including Parks Canada. Parking and congestion are

associated challenges (Banff, Alma) and have been offsets by shuttles to and from the Banff town core

For reference purposes, the *GM Cultural Blueprint* (2011) profiles three cultural-specific best practices:

1. **Les Iles-de-la-Madeleine and Arrimage**: a not-for-profit cultural organization in the Magdalen Island that supports artists and cultural organizations and works with municipal, regional and national partners to promote the arts and culture.
2. **The NordNorsk Kunstnersenter (NNKS)**: an international initiative; a self-managed artists' centre in Norway, whose mission is to promote and disseminate contemporary arts and crafts.
3. **The Erin Arts Centre** international initiative based on the Isle of Man, British Isles dedicated to facilitating the process of creating and performing art in order to benefit the Island community of Port Erin.

The Cultural Blueprint identifies the objective, background, program and clientele of each project as well as the organizational structure, impact, benefits and success factors of each.

## Profile of Our Visitors

### *"The customer is king".*

Understanding the visitor who...

- Chooses to travel to and throughout Newfoundland – especially Western Newfoundland;
- What that visitor seeks and expects in an experience; and
- The Gros Morne Region's ability to satisfy expectations and deliver on "Wow" tourism experience promises.

These facts are critical to long term tourism development and form a basis of the GM Region Strategic Tourism Plan. Solid programs and winning experiences are based in knowledge of visitors and what they want.

Gros Morne visitor highlights are presented below.

Details of visitation to Atlantic Canada; to Newfoundland and Labrador, Western NL and to the GM area are presented in **Appendix D**.

## ● Gros Morne National Park Visitors

Gros Morne National Park represents a tourism advantage for the enclave communities of the Gros Morne region. Its recognition and ability to entice visitors plus detailed visitor information can be used to inform planning and partnerships. Park visitor highlights shown in Table 3<sup>4</sup>.

**Table 3: Gros Morne National Park –Visitor Highlights**

- **Visitation:** Consistent growth over the past 5 years: from 180,500 in 2011 to **207,000** visitors in 2015 – 13% increase **Season of Travel:** July and August peak months, followed by June and September (see **Appendix B**, Figure B-1).
- **GMNP Key Attractions’ Visitation:** – i.e. Lighthouse has increased 35% and Broom Point by 22% since 2011; camping increased by 24% in 2015.
- **Geographic Origin:** 4 out of 5 park visitors are Canadians: Ontario: 40%; NL: 24%; USA:13% (2014).
- **Party Age & Composition:** Majority: 45 years plus, not travelling with children (92%).
- **Motivations for Travel:** Visitors are “learners” – **Authentic Experiencers** and **Cultural History Buffs** (Explorer Quotient visitor profiles).
- **First Time Visitors to GMNP:** 79%: first visit;75%: GM one of several planned stops; 25%: GM the main destination for trip to NL.
- **Nights Spent:** Average: nearly 4 nights in GM and 3.6 nights in Park
- **Trip Planning:** 50%: recommended by friends and family; 45%: saw a NL tourism ad and contacted for information; 30%: GMNP website was first awareness of Park.

## ● Gros Morne Region Accommodation Trends

NL fixed roof accommodation statistics reveal that annual occupancy is under 36%, available room nights have decreased over time and average daily rates (ADR) and total room revenues have increased (Table 4)<sup>5</sup>.

**Table 4: Fixed Roof Accommodations: “Gros Morne Pocket” 2009-2015<sup>8</sup>**

	Occupancy	Aver. Daily Rate (ADR)	Room Nights Avail	Total Room Revenues (Millions)
2015*	36%	\$139.83	107,000	\$5.8M
2014	34%	\$137.33	109,000	\$5.1 M
2013	31%	\$135.99	113,000	\$5.1 M
2012	30%	\$129.54	116,000	\$4.8 M
2011	32%	\$125.20	121,000	\$4.9 M
2010	35%	\$122.55	120,000	\$5.1 M
2009	32%	\$115.40	116,000	\$4.3 M

Source: Department of BTCRD, March 2015

<sup>4</sup> Sources: Parks Canada - GMNP *Visitor Information Report* (2015), *Market Analysis 2014* and *GMNP Visitor Statistics*.

<sup>5</sup> NL Tourism, 2016, *Statistics on Fixed Roof Accommodations: Gros Morne Pocket 2009-2015*.

## The Plan – Going Forward

### ● Guiding Principles of the Plan

This Gros Morne Region Strategic Tourism Plan:

- Identifies new tactics that add value to the key GM planning efforts and initiatives already underway.
- Helps integrate and communicate development efforts.
- Aligns with the pillars of Sustainability: 1. respect for the environment, 2. financial viability, and 3. social and cultural well-being.
- Recognizes that GMNP is the key driver and motivator for visitation to the area (and indeed western Newfoundland).
- Recognizes GMNP and GMCA as keys to leading Regional collaborate to support, enhance and benefit from realizing shared tourism Vision and Goal.
- Considers healthy and successful enclave communities as the basis for regional strength.
- Acknowledges business development and entrepreneurship as critical elements in fueling successful tourism growth.

### ● Vision and Overarching Goal

To guide the Plan, a Vision for Tourism and a Tourism Goal for the Region are proposed – both drawn from regional consultation efforts and existing strategies.<sup>6</sup> These elements need to be validated by stakeholders.

#### **DRAFT 10-Year GM Tourism VISION (to 2027)**

*Gros Morne Region is internationally sought after as an iconic Canadian travel destination where spectacular nature, cultural expression and authenticity are interwoven to enrich the lives of visitors and residents.*

With a Vision for the future collectively viewed as an ambitious yet achievable outcome, the STAR regional tourism plan presents as an interim target, a 5-year Goal, and identifies strategic actions required in the over the next 5 years to bring the Vision to ground.

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<sup>6</sup> Considers visions outlined in GMNP Management Plan; *Vision 2020, Uncommon Potential*; *GM Cultural Blueprint*; *National Stakeholder Engagement Strategy*; *Destination Development Plan for the Western NL Region*.

## 5-Year GOAL GM Region Strategic Tourism Plan

By 2021, Gros Morne Region is the most renowned destination in Atlantic Canada. It will achieve this choice destination status by:

1. Delivering customer focused experiences,
2. Advancing strategic tourism development and business principles, and
3. Best practice collaboration among public and private partners locally, nationally and internationally.

## ● Strategic Recommendations and Tactics

Eight (8) Strategic Recommendations are specified below, along with core tactics. The GM Region Strategic Tourism Plan is written to deliver key strategic actions in the next five (5) years that contribute to achieving the Vision. A brief rationale/context for each recommendation is provided in **Appendix E**.

The Plan recommends that the Gros Morne Region:

### **1. Validate/ endorse the proposed Tourism Vision and Goal and “live them” to the benefit all visitors as well as the regional and provincial economy.**

- i. Dedicate time to a **visioning workshop**, managed by third-party Facilitator, where operators, stakeholders, municipal and community leaders, residents, provincial and national partners gather to anticipate what the Vision means for the region. Each participant is encouraged during the workshop to commit to an action to realize the vision within the following 12 months.
  - **Responsibility:** TCT
  - **Estimated Costs:** \$5,000 for Facilitator; perhaps available at no charge from provincial government resources/ ACOA assistance.
  - **Timeframe:** Early 2018

### **2. Create an industry-driven, regional Tourism Coordinating Team, with support from an individual identified to perform the job and functions of a full-time Tourism Specialist.**

- i. **Regional Tourism Coordinating Team:** Create a regional *Tourism Coordinating Team (TCT)*, evolving from the Working Committee to advance strategies and tactics of the GM Region Strategic Tourism Plan. TCT brings new and expanded skill sets to the regional tourism table, advises regarding economic, social/cultural, environmental/natural impacts of tourism in the Region and actively participates in regional programming as appropriate.

- The region as a whole must “own” the Plan and share in the responsibilities and demands of making it successful.
- Those who assume TCT obligations need to possess the authority to make decisions and the ability to move those decisions forward -- with business, GMCA, Parks Canada, community and municipal representation as part of the group

A recommended Tourism Management Framework and Terms of Reference for the TCT and Tourism Specialist are included in **Appendix F**.

#### TCT Roles:

- Leads on regional tourism priorities; and “speaks for” regional tourism efforts
  - Directs/ participates in regional tourism activities such as Tourism Forums and special projects
  - Advises on regional communication and product development efforts
  - Advises on regional marketing efforts
  - Monitors updates the Asset inventory and Tourism Action Framework
  - Monitors and reports on successes, benchmarks and shifts in the tourism landscape
  - Advises on rationalize and optimization of use of significant, existing infrastructure
  - Needs secretariat/ coordinating assistance – “boots on the ground”
  - The Regional Tourism Specialist reports to and supports efforts of the TCT.
  - **Responsibility:** Key stakeholders/ industry/ GMNP/ GMCA/ STAR Working Committee to organize
  - **Estimated Costs:** Time
  - **Timeframe:** STAR Working Committee acts as TCT until October 2017; helps recommend TCT members.
- ii. **Regional Tourism Specialist Position:** The Regional Tourism Specialist reports to and supports efforts of the TCT. GMNP and GMCA collaborate and use existing resources to perform the job and functions of a full-time, *Regional Tourism Specialist*, to work with TCT and coordinate regional tourism activities. It is suggested that responsibility for the Specialist position be shared by GMNP and GMCA. The Tourism Specialist’s primary efforts would be devoted (50%) to regional tourism initiatives as outlined in this Plan and (50%) to online marketing responsibilities (see recommendations 6: ii and 6: iii.)
- **Responsibility:** Key stakeholders/ industry/ GMNP/ GMCA to organize
  - **Estimated Costs:** Salary and expenses of Regional Tourism Specialist = \$50,000 to be identified from existing GMNP and GMCA resources.
  - **Timeframe:** no later than January 2018
- iii. **Use the Tourism Action Framework:** The TCT works with partners to develop, enact and update the **GM Tourism Action Framework** with priorities, timelines, task assignments and budgets, to track and integrate tourism development initiatives throughout GM (See **Appendix G** where DRAFT Tourism Action Framework 2017 is summarized.) The Tourism Action Framework:

- Is an important communications tool, giving everyone in the region the opportunity to track major initiatives underway in a holistic way, on an annual basis.
  - Consolidates the key actions and initiatives underway in the region for any given year as drawn from annual plans for GMNP, projects evolving from the Cultural Blueprint, priorities of the Western Destination Development Plan and community development projects.
  - Integrates actions to better reflect strategic activity and encourage proactive partnership and cooperation.
  - Annually updated by Tourism Specialist.
  - **Responsibility:** STAR Working Committee (2016 and 2017); TCT for 2018 and go-forward
  - **Estimated Costs:** Time
  - **Timeframe:** Updated and circulated annually in January and reviewed at the fall Tourism Forum.
- iv. **GM Commitment to Guests:** Generate a regional *Commitment to Our Guests*, a “statement of intent to grow with tourism” for regional tourism stakeholders that articulates the collective commitment of enclave municipal units, businesses, Parks Canada, organizations, festivals & events to the Goal of this Plan and to a visitor-centric and environmentally sensitive approach to tourism. The Commitment to Our Guests will identify customer-focus and service quality as pillars of the GM tourism offer. It provides an opportunity to start an on-going conversation on shared commitments and tourism principles to achieve the GM Vision and Goal. Would be endorsed and promoted as the GM Region’s public commitment to tourism excellence
- Is posted on key websites and operator websites.
  - A DRAFT Commitment to Our Guests is included in **Appendix H**.
  - **Responsibility:** STAR Working Committee to endorse, promote and populate on websites.
  - **Estimated Costs:** Time
  - **Timeframe:** In place for fall 2017 Tourism Forum
- v. **Regional Cell Service Improvement:** Work with Parks Canada to develop a business case for improved cell services throughout the GM Region.
- **Responsibility:** TCT
  - **Estimated Costs:** \$750 for effort.
  - **Timeframe:** Winter 2016/2017
- vi. **Supporting Human Resource Needs:** TCT must remain alert to forging collaborations and partnerships with existing organizations/ institutions/ governments that have the potential to help alleviate human resource pressures and/or provide training assistance to individual businesses, volunteers and community groups and organizations in the region. While the Tourism Program at MUN’s Grenfell Campus is in hiatus (as this report is written) the College of the North Atlantic launches a Tourism and Hospitality Management program in fall 2016 complete with work terms, from the campus in St. John’s. Brenda Tobin

([brenda.tobin@cna.nl.ca](mailto:brenda.tobin@cna.nl.ca)) is the Dean of Tourism and Applied Arts at CONA and is an important contact. On-going liaison with the NL Tourism Board and Hospitality NL on human resource issues is recommended to ensure GM region is plugging in to any upcoming discussions and solutions. The Community Sector Council Newfoundland and Labrador (CSC; [www.communitysector.nl.ca](http://www.communitysector.nl.ca)) is an independent voluntary organization dedicated to promoting social and economic well-being while demonstrating the value of the community (voluntary, nonprofit) sector throughout NL. The organization offers training and workshops to support sustainability among community organizations. Penny Rowe ([csc@cscnl.ca](mailto:csc@cscnl.ca)) is the organization's CEO.

- **Responsibility:** STAR Working Committee/TCT
- **Estimated Costs:** Time
- **Timeframe:** Beginning winter 2016/ spring 2017 and ongoing

**3. Communicate, cooperate and partner among stakeholders in relevant and profitable ways suggested in this Plan, by committing to an annual regional Tourism Forum and systemic networking efforts to ensure a strong culture of communication.**

- i. **Share and Promote the Plan:** Actively promote and share the GM Region Strategic Tourism Plan broadly with industry and community leaders, businesses and associated organizations
  - **Responsibility:** STAR Working Committee
  - **Estimated Costs:** No cost; use existing networks and STAR opportunities
  - **Timeframe:** Beginning in September 2016 and on-going.
  
- ii. **Annual Tourism Forum: Host a Tourism Forum annually in November (optionally another in Spring)** that is **open to all** to review the past season and highlight activities for the upcoming year. The Forum(s) encourages a flow of information of benefit to a cross-section of operators and partners. The Forum should be used to:
  - Debrief on the season, accomplishments and refinements/ gathering input to enhance the regional plan for the following season.
  - Share information on upcoming activities/ common issues/ shared actions and facilitate networking among the regional industry.
  - Use the Tourism Action Framework and an updated (annually) Asset Inventory as communication tools for the Forum.
  - Hold 1<sup>st</sup> Forum in November 2016.
  - The STAR Working Committee is the proponent of the 2016, 2017 Tourism Forums.
  - **Responsibility:** STAR Working Committee is the 2016/ 2017 proponent; TCT is proponent 2018 and beyond
  - **Estimated Costs:** Resource allocation is shared between GMCA/ GMNP (estimated at \$750 potential hard costs per session)
  - **Timeframe:** Beginning Forums in November 2016; November, 2017 and out years

- iv. **Communicate Widely & Provide Frequent Updates:** Use the Tourism Forum as an opportunity for Parks Canada Visitor Experience Frontline Staff to obtain first-hand information from enclave communities on upcoming and successful initiatives to include in visitor counselling. Forums are also an opportunity for the Park to share information that informs private sector and community efforts such as updated visitor profiles, expectations from visitors and feedback to current activities.
  - **Responsibility:** TCT and GMNP
  - **Estimated Costs:** Staff time
  - **Timeframe:** Beginning June 2017
  
- v. **Operator Education:** Use the Tourism Forum as an opportunity to educate operators on available funding opportunities and existing programs; invite funding agencies to provide snapshots of available funding opportunities for both hard and soft costs.
  - **Responsibility:** TCT to initiate/Regional Tourism Specialist to execute once hired
  - **Estimated Costs:** Staff time to coordinate funders
  - **Timeframe:** November 2017 Tourism Forum
  
- vi. **Calendar of Events:** Use the shared calendar of events and activities on [www.visitgrosmorne.com](http://www.visitgrosmorne.com) as the on-going tool for updating visitor experiences and activities through the season.
  - **Responsibility:** TCT to initiate/ Regional Tourism Specialist to execute
  - **Estimated Costs:** Included with enhancements to [www.visitgrosmorne.com](http://www.visitgrosmorne.com) (recommendation 6: iii)
  - **Timeframe:** Renewed launch January 2017
  
- vii. **Existing Groups:** Continue existing meetings for exchange of specific information, such as the Mayor’s Forum (with GMNP leadership) and meetings of Gros Morne Gatherings members, reporting outcomes to TCT and to the Tourism Forums; the objective is to streamline as much regional tourism decision-making as possible into TCT.
  - **Responsibility:** TCT to initiate/ Regional Tourism Specialist to execute once hired
  - **Estimated Costs:** Included with enhancements to [www.visitgrosmorne.com](http://www.visitgrosmorne.com) (recommendation 6: iii)
  - **Timeframe:** Renewed launch January 2017

**4. Build evolving, meaningful visitor experiences region-wide, by optimizing available industry education resources and market-readiness tools to extend visitor stays and expenditures.**

- i. **Develop and hold an experience Refresher Workshop:** Conduct an “experience refresher workshop” annually with GMIST, for new or smaller experience providers (i.e. Church groups offering suppers, new operators, Museum boards, volunteer events) needing hands-on

assistance with developing, enhancing and describing an experience. Use the highlights from *Edge of the Wedge* and *Experience Toolkit information* from NL and from NS as background.

- **Responsibility:** TCT with GMIST
  - **Estimated Costs:** \$1,500 per session for delivery
  - **Timeframe:** One-day session annually beginning 2017 (each May)
- ii. **Encourage revival of BICT Courses:** Encourage revival of dormant cultural tourism courses formerly offered by the Bonavista Institute for Cultural Tourism (BICT) ([www.bonavistainstitute.ca](http://www.bonavistainstitute.ca)) to enhance best practice experiences in GM Region. Such courses as building themed routes, culinary tourism and menu development, creating profitable partnerships and the role of municipalities in tourism development are recommended as priorities.
- **Responsibility:** TCT and GMCA to explore. (CNA, GMIST, HNL and/or MUN as possible delivery agents)
  - **Estimated Costs:** TBD based upon availability of courses; cost-recovery model anticipated.
  - **Timeframe:** Explore opportunities in 2018
- iii. **Conduct AMR:** Conduct the *Accelerated Market Readiness (AMR)* Program for 10 GM operators as capacity building for STAR in 2017 and continue as interest/ funding exists.
- **Responsibility:** STAR Working Committee/TCT to sanction; Tourism Specialist to administer once hired
  - **Estimated Costs:** Shared costs among ACOA-Tourism Atlantic and proponent at an estimated cost of \$2,000 per operator (Per operator investment of \$500 by proponent and \$350 by operator, \$1,150 from ACOA-Tourism Atlantic).
  - **Timeframe:** 10 operators in 2017 and 10 each year thereafter.
- iv. **Advanced Experience Development Program:** Work with GMIST to devise an advanced program in experience development that would be piloted among self-identified, mature operators in GM region who are “graduates” of the GMIST, *Edge of the Wedge* program (e.g. “Elite Edgies”). This advanced program is intended to reinforce and rejuvenate experience offers in GM, reinforcing an additional “high level” program for GMIST.
- Use key information from AMR recommendations to guide development of the new advanced experience development program for *Elite Edgies*.
  - Pilot the new program among key operators in GM Region in 2018.
  - Continue to highlight these key operators as Best Practices during GMIST sessions onsite.
  - **Responsibility:** GMIST, TCT and Tourism Specialist once hired
  - **Estimated Costs:** TBD
  - **Timeframe:** 2018.
- v. **Negotiate with MUN re: Bonne Bay Marine Station:** STAR Working Committee to initiate an ongoing conversation with Memorial University of Newfoundland (MUN) on its vision for the

Bonne Bay Marine Station; collaborating where possible to ensure it is optimized as a tourism resource.

- **Responsibility:** STAR Working Committee/TCT
- **Estimated Costs:** Time
- **Timeframe:** Beginning winter 2016/ spring 2017 and ongoing

vi. **Regional Certification:** Strive to become the first “World Host Certified” region in Atlantic Canada -- to have everyone working frontline with visitors trained and certified in the program. Partner with HNL to develop a multi-year training initiative to achieve.

- **Responsibility:** Tourism Specialist, in consultation with HNL.
- **Estimated Costs:** TBD based upon plan with HNL; assume \$1000/year.
- **Timeframe:** Over 3 years (2017 to 2019); Begin discussions in 2016 for 2017; continue through to 2019 for “full certification”.

vii. **Culinary and Cultural Experience Priorities:** Optimizing the work underway to deliver recommendations outlined in the Cultural Blueprint (2011), and culinary development efforts in 2015/16 give priority attention to experience development and market-readiness associated with these themes.

- **Responsibility:** STAR Working Committee/TCT
- **Estimated Costs:** Time
- Timeframe:** Beginning winter 2016/ spring 2017 and ongoing

***5. Recognize tourism-related environmental practices as: 1) valuable and profitable for tourism growth, and 2) as a way of competitively positioning the destination—in line with the Regional Vision, Parks Canada’s philosophy and destination status as a UNESCO World Heritage Site.***

- i. **Survey Tourism Operators re: Environmental Stewardship Practices:** Conduct a survey of tourism operations, businesses, institutions, municipalities and organizations in the GM Region to establish a benchmark and the current situation with regard to environmental practices. The survey would be conducted online in spring 2018 to gather a status report on:
- Current environmental practices in play including traditional activities which, by their nature, may be inherently sustainable
  - Past environmental initiatives in GM region
  - The appetite of businesses, municipal units and stakeholders for enhanced collaborative environmental programming.
  - **Responsibility:** TCT/Tourism Specialist
  - **Estimated Costs:** \$500 for use of online survey tool plus time associated with survey development, survey implementation and reporting.
  - **Timeframe:** Spring 2018

- ii. **Consider Stewardship Environmental Program:** Based upon Survey Results, and using environmental guidelines available from Parks Canada as benchmarks, consider appropriate programming (or program adjustments) that will:
- Position the region as stewards of the Vision of an iconic destination rooted in spectacular nature
  - Support and fund practical, realistic and affordable efforts to enhance environmental practices within enclave communities
  - Communicate to visitors and target audiences the collaborative efforts underway that support the Parks Canada, UNESCO and brand of GM
  - Position the region as an innovator of environmental practices.
  - **Responsibility:** TCT/Tourism Specialist
  - **Estimated costs:** Based upon programs/ efforts identified; available funding programs could be available
  - **Timeframe:** 2018-2019 for program development as appropriate

**6. Extend the tourism season by planning strategically, beginning with a November 2016 workshop aimed at extending June and September periods.**

- i. **Devise a Season Extension Approach:** Develop a season extension approach to which the region can “sign on” and implement.
- As a capacity building session of STAR conduct a ***Season Extension Symposium Focusing on Human Resource Challenges*** featuring current research and data where operators participate in a structured session to: a) explore the HR issues of season extension; b) share in best practice efforts of destinations/operators who have addressed the same challenge; and c) work together to establish some solutions and priorities for the GM Region.
  - Use the Asset Inventory as a tool for information
  - Augment/gather information required to profile the current situation and identify priority opportunities and best practices
  - Generate tactics for a season extension approach at a workshop in 2016 coupled with the Tourism Forum in November, for implementation as appropriate, in 2017.
  - **Responsibility:** Star Working Committee is proponent; Consulting Team to develop and deliver symposium in the fall (combined with the Tourism Forum) with a deliverable of an approach for season extension.
  - **Estimated Costs:** Development of action plan and symposium embedded in STAR program development.
  - **Timeframe:** Recommended for November 2016.

**7. Continue to market the region as a single destination; dedicate additional human and financial resources and a prioritized work plan to focus on online tactics and Brand development.**

- i. **TCT to Speak with One Voice:** Empower the TCT as the GM “voice” for regional marketing advice and collaboration.
- **Responsibility:** TCT partners and stakeholders
  - **Estimated Costs:** No cost
  - **Timeframe:** Begin in 2018
- ii. **Develop work plan for Focus on GM’s On-line Presence:** Deploy 50% of time and effort of the Tourism Specialist to ensure that the Gros Morne destination is appropriately and consistently represented online. Within 3 months of employment, the Tourism Specialist will extensively review the key private sector, festival, and organization websites/ social media efforts that currently present the region and its experiences/services online, and generate a work plan (including timelines, success measures and budget required) to more efficiently and effectively enhance and integrate online efforts. This review will include but not be limited to: [www.visitgrosmorne.com](http://www.visitgrosmorne.com), [www.pc.gc.ca/grosmorne](http://www.pc.gc.ca/grosmorne), [www.grosmorne.com](http://www.grosmorne.com), [www.creativegrosmore.com](http://www.creativegrosmore.com), festival websites, enclave community websites and associated social media. Based upon the review and with a clear objective of increasing visits booked, the work plan focus is to:
- Embed consistent key messages and branding themes in all public/private/ non-profit online efforts
  - Assist with updating and maintaining websites of festivals and community activities which are so fundamental to the success of GM tourism
  - Enhance use of photography and video
  - Consolidate and enhance social media efforts to ensure effective management and customer interactions
  - Optimize the relationship with [www.newfoundlandlabrador.com](http://www.newfoundlandlabrador.com)
  - Optimize partnerships with [www.grosmorne.com](http://www.grosmorne.com)
  - Partner with HNL and Western DMO to conduct online/social media workshops and measure results
  - Link sites

Note: The work plan will form the basis of a business case/ formula for enhanced funding from local sources for GM’s online presence (see Rec 7, iii below). **Appendix J** includes *Considerations: Developing a Business Case and Contributions for Enhanced Online Investment.*

- **Responsibility:** Tourism Specialist generates work plan and business case with sign-off by the TCT
- **Estimated Costs:** Time
- **Timeframe:** Within 3 months of Tourism Specialist hire (estimated end of Q1-2018)

- iii. **Generate Additional Dollars to Invest in GM's Online Presence:** The TCT will lead an effort to generate local dollars to enhance the destination's online presence; target is investment to the value of \$5,000 for 2019. The current defacto website for Gros Morne, [www.visitgrosmorne.com](http://www.visitgrosmorne.com), is supported by few and everyone benefits. It is supported primarily by funds from members of Gros Morne Gatherings and managed by GMIST. A strong and coordinated online presence requires each community and local business to recognize the importance of speaking to visitors "with one voice" and contribute to the year-round, online efforts with financial investments in the core site and strategic investments in the community/ festival/ organization websites that feed [www.visitgrosmore.com](http://www.visitgrosmore.com).
- The Consulting Team has included considerations regarding local investments (see **Appendix J**). Note: **Appendix J** provides a guide, however results of the TS's research to develop the online work plan will drive the funding formula.
  - **Responsibility:** TCT to endorse and implement funding formula (see Appendix J).
  - **Estimated Costs:** Time, eventual contributions (2019) from communities and businesses.
  - **Timeframe:** Business case development & approval-2018; Year one of implementation-2019.
- iv. **Leverage [www.newfoundlandlabrador.com](http://www.newfoundlandlabrador.com) wherever Possible:** With more than 2 million visits annually (and growing) [www.newfoundlandlabrador.com](http://www.newfoundlandlabrador.com) is a powerful marketing channel for GM region. Make all possible connections with [www.newfoundlandlabrador.com](http://www.newfoundlandlabrador.com), especially its itinerary builder functions and include annual visits to the provincial contact center and *Open Mike* with the department.
- **Responsibility:** STAR Working Committee then evolves to TCT in collaboration with Tourism NL and WDMO
  - **Estimated Costs:** Time
  - **Timeframe:** Beginning in 2017 and on-going
- v. **Strengthen VOBB and Old Crow Magazine Partnerships:** Devote attention to strengthening partnerships with VOBB Radio ([www.vobb.com](http://www.vobb.com)) and Old Crow Magazine to reinforce the brand to visitors (old and new) and the stories of the region 24/7. Work with both on content and on shared promotional efforts as enhanced marketing partners, engaging them as active, year-round ambassadors for the destination.
- **Responsibility:** STAR Working Committee/ TCT in collaboration with Tourism NL and WDMO
  - **Estimated Costs:** TBD in discussion (minimal costs anticipated)
  - **Timeframe:** Beginning in 2017 and on-going
- vi. **Consolidate Key Messages and Work Toward Professionally Branding the Region:** Today, (depending upon where you look) there are a number of themes and taglines float for Gros Morne:
- From Creative Gros Morne's *Where Culture Comes Naturally*;
  - Gros Morne Gatherings *Great Outdoors. Great Ideas.*;
  - Gros Morne, *Festival Capital of Newfoundland* on [www.visitgrosmorne.com](http://www.visitgrosmorne.com), and
  - Norris Point's tagline *Where Marine Adventures Begin.*

Some websites, including those of enclave communities, altogether miss the golden opportunity of aligning themselves with the powerful recognition of Gros Morne.

- Adopt an interim tagline for consistent use in marketing materials and efforts
- Sign off on key messages and branding themes for consistent use in marketing and for the next three years (to feed a strengthening regional online effort)
  - Work to embed the tagline/ key messages in public/ private/ non-profit online enhancements and regional offline efforts.
  - By 2019, as resources present themselves, undertake a full Branding effort.
- **Responsibility:** TCT endorses an appropriate tagline for consistent use/ Tourism Specialist uses it consistently.
- **Estimated Costs:** Time associated with development of tagline/ \$1,000 Honorarium for professional assistance as required (2017); Branding effort up to \$10,000 (2019)
- **Timeframe:** Beginning in 2017 and on-going; Branding effort by 2019.

**8. Monitor progress and report results in specific ways suggested in the Plan to measure the effectiveness of recommendations.**

- i. **Finalize Measures of Success for Next Three Years:** Upon approval of the Plan, the STAR Working Committee/ TCT and Tourism Specialist when in place will measure of success of efforts in the Plan using the performance indicators identified in **Appendix E**.
- **Responsibility:** STAR Working Committee/ TCT and Tourism Specialist when In place
  - **Estimated Costs:** No costs
  - **Timeframe:** Beginning Fall 2016

Activities recommended in the Plan can be measured against pre-determined targets such as participation in World Host training year-over-year and on-going seminars sponsored by STAR; number of volunteer organizations who participate in the Experience Refresher Workshop. These results would be communicated to industry and used as inputs for planning purposes.

## IMPLEMENTATION TIMELINE AND BUDGET

The five-year implementation timeline for the above objectives/recommendations is summarized in **Table 5** on the pages that follow. As the Report is presented the anticipated budget stands at approximately **\$12,117** for year one. Once all costing is complete an annual budget of up to **\$26,019** is estimated to sustain the efforts outlined in the plan. As previously noted, these budget numbers assume Tourism Specialist funding, estimated at \$50,000 per year, comes from existing sources.

## CONCLUSION

This Gros Morne Region Strategic Tourism Plan serves as a guide for destination development for the next five years. It is intended to be reviewed and refined annually. The Gros Morne Region has the potential to be a leading destination in Canada; collaboration among Gros Morne National Park, GMCA, industry operators, community organizations and residents will contribute to make this happen. The collaborative implementation of this Strategic Tourism Plan will ensure achievable and profitable results as well as sustainability for tourism in the Region.

**Table 5: GM Plan Implementation Timeline and Estimated Budget**

Recommendation/ Objective	Implementation Timeline																Estimated Costs			
	2016		2017				2018				2019				2020	2021	2017	2018	2019	
Recommendations & Tactics	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4						
<b>1. Endorse Tourism Vision</b>																				
i. Visioning Workshop							■													\$5,000
<b>2. Leadership Team and Staffing</b>																				
i. Create Regional Tourism Coordinating Team (TC) - report	■	→	→	→	→	→	→	→	→	→	→	→	→	→	→	→				
ii. Identify Regional Tourism Specialist (position valued at \$50,000/yr)			■	→	→	→	→	→	→	→	→	→	→	→	→					
iii. Implement & Monitor Tourism Action Framework			■				■				■									
iv. Generate regional Commitment to Guests	■																			
v. Develop business case for improved cell service throughout the region		■	■	■																\$750
<b>3. Communicate, cooperate &amp; partner</b>																				
i. Promote Strategic Tourism Plan	→	→	→	→	→	→	→	→	→	→	→	→	→	→	→	→				
ii Presentation of Draft Plan																				\$350
iii. Host Tourism Forum(s)		■		■		■		■		■		■		■		■				\$1,500
iv. Use Tourism Forum to communicate Parks Canada and community initiatives & funding opportunities.		■		■		■		■		■		■		■		■				\$1,500

Continued...



Table 5 (continued...)

Recommendation/ Objective																Estimated Costs			
	2017				2018				2019				2020	2021	2017	2018	2019		
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4					
<b>3. Communicate, cooperate &amp; partner (cont'd.)</b>																			
v. Use Tourism Forums to communicate funding opportunities.		■		■		■		■		■		■		■					
vi. Use shared calendar of events on www.visitgrosmorne.com			→	→	→	→	→	→	→	→	→	→	→	→	→				
vii. Continue existing meetings (e.g. Mayors Forum.)	→	→	→	→	→	→	→	→	→	→	→	→	→	→	→				
<b>4. Offer diverse, meaningful experiences</b>																			
i. Encourage GMIST to conduct a "experience refresher workshop"				■				■				■					\$1,500	\$1,500	\$1,500
ii. Explore BICT course offerings		■	■																
iii. Offer AMR to 10 operators (\$500 x 10)				■				■				■					\$5,000	\$5,000	\$5,000
iv. Work with GMIST to develop & offer advanced "Elite Edgies" program								■											
v. Discussions with MUN re: Bonne Bay Marine Station		■																	
vi. Strive to become first "World Host Certified" AC destination				→	→	→	→	→	→	→	→	→	→	→	→		\$1,000	\$1,000	\$1,000
<b>5.Environmental Practices</b>																			
i. Develop environmental action plan	■	■																	
ii. Conduct Survey							■											\$500	
iii. Programs as required	■	■					■												

Continued...



Table 5 (continued...)

Recommendation/ Objective																	Estimated Costs				
			2017				2018				2019				2020	2021	2017	2018	2019		
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4							
<b>6. Strategic Season Extension</b>																					
i. Devise Approach and workshop with operators																					
<b>7. Market the Region with single destination focus</b>																					
i. TCT acts as the voice for GM region marketing advice & collaboration			→	→	→	→	→	→	→	→	→	→	→	→	→	→					
ii. Work plan for online efforts			→	→			→	→			→	→			→	→					
iii. Invest in www.visitgrosmorne.com			→	→	→	→	→	→	→	→	→	→	→	→	→	→			\$5,000		
iv. Leverage NL provincial website			→	→	→	→	→	→	→	→	→	→	→	→	→	→					
v. Strengthen partnerships with VOBB and Old Crow			→	→	→	→	→	→	→	→	→	→	→	→	→	→					
vi. Consolidate key messages and Brand development																			\$1,000	\$10,000	
<b>8. Monitor progress and report results</b>																					
i. Identify specific performance measures and report on these.		→	→	→	→	→	→	→	→	→	→	→	→	→	→	→					
<b>TOTAL ESTIMATED COSTS at August 23 with some projects yet to be costed. This assumes Tourism Specialist funding comes from existing sources.</b>																			\$12,117	\$17,518	\$26,019



## Appendix A: GM Resident Tourism Survey Highlights: <sup>7</sup>

In February 2016, some 150+ residents and businesses were invited to offer personal opinion and insight into opportunities to enhance and grow regional tourism by participating in an online Survey of nine questions. Seventy-one (71) responses were received and the spirited and thoughtful responses indicate enthusiasm to grow the sector and a level of tourism understanding which is generally mature and sophisticated in Atlantic Canada. Highlights are shown in Table A-1.

**Table A-1: GM Resident Tourism Survey Highlights**

- 85% expressed interest in how tourism development impacts their communities; 50% were business owners; more than 50% were aged 50 to 64.
- Tourism growth priorities identified during the January 2016 workshop were validated: 100% of respondents viewed “protecting and enhancing the natural environment” as important and described GM’s natural beauty as the reason visitors are attracted to Western NL. This finding is consistent with information gathered during the Western Region Destination Development Process (DDP) and in the provincial Exit Survey.
- 98.5% viewed better communications as vital among communities and businesses.
- Protecting and enhancing cultural assets are also integral to success
- There is enthusiasm for working toward season extension with particular emphasis on the shoulder months of June and October; the need for winter tourism options was also cited.
- 80% felt GM region is marketed/ promoted effectively outside NL; only 63% feel that GM is marketed/promoted effectively within the province.
- A singular destination focus (i.e. regional approach) and strengthened online efforts are seen as critical to tourism growth.

<sup>7</sup> Detailed results are available at <http://grosbornecoop.com/wordpress/wp-content/uploads/GM-Resident-Tourism-Survey-RESULTS-SUMMARY-Mar-4-2015-2.pdf>

## **Appendix B: Tourism Life Cycle Stages, GM Visitation, Room Nights and Key Dates/Timelines**

### **Stages of the TLC** (as depicted in Figure 2)

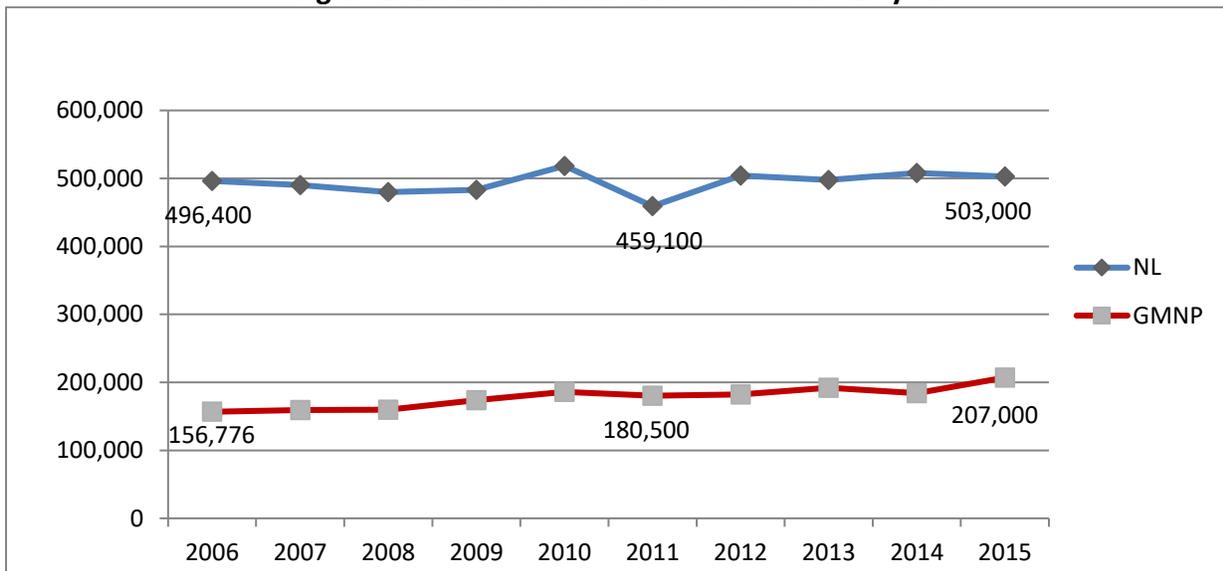
1. **EXPLORATION** - A few hardy and adventurous people looking for something different in a holiday find a place that is special in terms of its culture, natural beauty, history or landscape. There may be no tourist services available and local people will not be involved in tourist money-making activities; not many tourist facilities.
  - traditional society
  - this is Gros Morne at the turn of the century; early 1900's.
  
2. **INVOLVEMENT** - Residents begin to notice increasing numbers of people coming to their local area. They start businesses to provide accommodation, food, guides, and transport.
  - take off and development
  - GM in 1976 – assume – at naming of the Park Reserve and continuing today.
  
3. **DEVELOPMENT**: Big companies start to see the emerging potential of the area as a destination and start to invest money in the region. They build large hotel complexes and sell package holidays (a package might include travel, accommodation, food and excursions). This makes the numbers of tourists swell dramatically and massively expands the number of job opportunities for locals, in both tourist related jobs and in construction and services (*brings many advantages and disadvantages*).
  - Peak growth
  - ***This is the stage which best describes Gros Morne Development. Development has been slowed largely due to the seasonal nature of the business and by the economy's downturn in 2008. Using Western room nights as a proxy for growth, it appears that there was a boom in room nights offered in 2007 – just before the stock market crash.***
  
4. **CONSOLIDATION** - The local economy is dominated by tourism at this stage, and many local people make their money from tourism. However, this can remove people from other industries such as farming and fishing and these industries can suffer as a result. There will be continued tourism building and expansion BUT some of the older buildings will start to become unattractive and a lower quality client base might result.
  
5. **STAGNATION** - Competition from other areas, some crowding and a loss of the original features (e.g. it had a great beach and/or hiking trails but that is now crowded and full of rubbish); can cause the resort to stop growing. The number of visitors levels off then starts to decline, threatening local businesses and services.
  
6. **DECLINE? OR REJUVENATION?** From the stagnation point onwards there are 2 basic possibilities: 1. Decline in various forms, or 2. Rejuvenation (regrowth of the area). Decline

can be slow or rapid, and regular visitors are replaced by people seeking a cheap break or day trippers. Rejuvenation involves a cash injection from either a private company or the government, to create a new attraction within the original resort to boost its popularity.

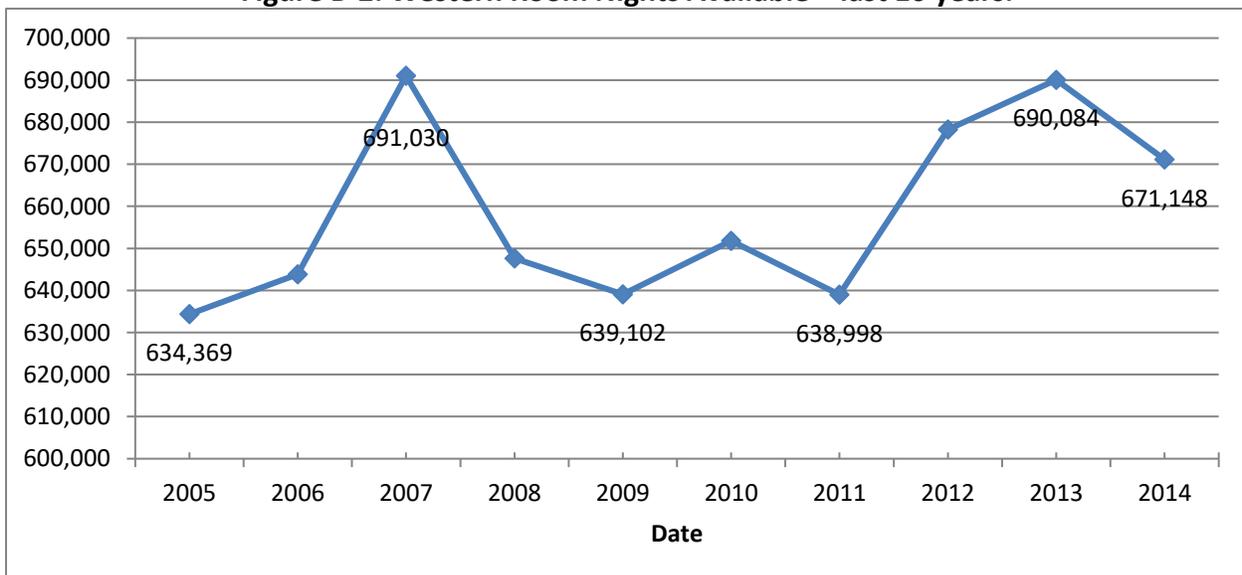
The “Critical Range of Elements of Capacity” are in the “consolidation” and “stagnation” stages when decisions need to be made about tourism development -- BEFORE either decline or rejuvenation.”

NL and GMNP Visitation over the past 10 years are shown in Figure B-1. Room nights available in Western NL are depicted in Figure B-2.

**Figure B-1: NL and GMNP Visitation -- last 10 years**



**Figure B-2: Western Room Nights Available – last 10 years.**



Key tourism development dates for Gros Morne are shown in Table B-1.

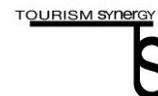
**Table B-1: Gros Morne History – What Happened When?**

	Evidence of human history in this area dating back 3500 years (Maritime Archaic Tradition), followed by the Dorset and Groswater Eskimos 2500 years ago.
Pre 1800's	Evidence that Micmac once inhabited the area
1809 -	English settlement of the area; trading station at WP
Mid 1800's	WP was the main "commercial centre" and centre for law and government in Western NL; main industry in Bonne Bay area: fishing in summer and logging in winter
1873 -	First Post Office at WP
1891 -	First church (Church of England) at RH
1898 -	First school at RH
1900 -	First Post Office RH
Early 1900's	Ferry service established from Woody Point to Norris Point
1939 -	Cottage Hospital built (NP)
1949 -	NL joined confederation
1966 -	RH became an incorporated community, then Town (90% serviced with water, sewer, paved roads, street lights.)
1968 -	Construction, opening of Highway 430 connecting north and south Bonne Bay
1973 -	Establishment of <b>GM National Park Reserve</b>
1987 -	Park designated a <b>UNESCO World Heritage Site</b> for both its geological history and its exceptional scenery.
1996 -	Establishment of Gros Morne Cooperating Association (GMCA)
2004 -	Formation of Gros Morne Gatherings (8 local accommodators to collect 3% Room Levy to market Gros Morne as a conference and meeting destination)
2005 -	<b>GMNP Reserve officially declared a National Park.</b>
2011 -	Woody Point designated as a Registered Heritage District by the Heritage Foundation of NL.
2013 -	Establishment of Creative Gros Morne.
2015/2016 -	First regional tourism planning process (S.T.A.R. Pilot)

## Appendix C: Best Practices

	Dimension	Destination		
		Banff and Lake Louise, AB	Alma, NB	Cavendish (Resort Municipality), PEI
1	<b>Reason Selected</b>	Located within Canada's first National Park, also a UNESCO World Heritage Site	STEP Graduate Community (2011); Proximity & relationship with Fundy National Park; headquarters in Alma West; part of Fundy UNESCO Biosphere	Proximity & relationship with PEI National Park; functions well as a tourism region.
2	<b>Population (2011 Census, Year round)</b>	Yr. round: Banff (town): 7,584; Lake Louise (hamlet): 1,041	232 (yr. round)	266 (yr round); swells to 7,500 daily during July & Aug.
3	<b># Visitors</b>	2015: BNP: 3.61 mil visitors (8.1% increase over 2014)	2013: FNP 240,081	<b>2015:</b> PEINP: 486,910; <b>2014:</b> Green Gables Shore Overnight: 215,232
4	<b>Estimated Visitor Spending</b>	\$1.9 billion in Canadian Rockies in 2012	Unknown	<b>2014:</b> \$178 million (40.5% of PEI Expenditures)
5	<b>Primary Industries</b>	Tourism	Tourism, Fishing (lobster, scallops)	Tourism, Agriculture
6	<b>Enclave Communities</b>	Banff, Lake Louise Mountain Resort and Village.	n/a	5: Stanley Bridge, Hope River, Bayview, Cavendish and North Rustico
7	<b>Lead Tourism Organization (who manages tourism?)</b>	<b>Banff &amp; Lake Louise Tourism (BLLT)</b> , Parks Canada -- they work closely together	<b>Village of Alma - Tourism Management Committee;</b> evolved from Vision Alma, a tourism specific group, initiated the STEP plan in 2011	<b>Tourism Cavendish Beach Inc (TCB);</b> membership based regional tourism association; Membership Levels: assoc. member (free), bronze (\$125), silver (\$250) and gold (\$500) - different levels of benefits
8	<b>Website</b>	<a href="https://www.banfflakelouise.com">https://www.banfflakelouise.com</a>	<a href="http://www.villageofalma.ca/">http://www.villageofalma.ca/</a>	<a href="http://cavendishbeachpei.com/">http://cavendishbeachpei.com/</a>
9	<b>Important Dates</b>	1885: Banff Nat Park established; 1917: winter tourism began; 2006: <b>2% Tourism Improvement Fee (TIF)</b> began to be charged by lodgings - part of longer term strategy to maintain & improve the competitiveness of the Banff & Lake Louise/Banff National Park destination.	1948: Nat Park established; 2010-2011 STEP Program Pilot for Alma area.	1937: PEI Nat Park established. Early 20th C: tourism increased due to automobile, beaches;
10	<b>Guiding Tourism Plan(s) &amp; Date</b>	<i>Bringing our Brand to Life: 2016 Business Plan</i>	<i>Vision Alma Strategic Plan, Feb 2012 (pre-cursor was the STEP Forward Plan, 2011)</i>	<i>Cavendish Beach Strategic Plan 2015-2018</i>
11	<b>Plan Tips (from Destinations)</b>	Plan needs to be aligned with Province; Ongoing funding required -- provided by TIF	Plan aligned with Provincial goals.	Plan needs to be aligned with that of Province.

	Dimension	Destination		
		Banff and Lake Louise, AB	Alma, NB	Cavendish (Resort Municipality), PEI
12	<b>Budget to Support Plan: Amount &amp; Source</b>	Over \$6.5 million; Sources: <b>2% Tourism Improvement Fee (TIF)</b> , membership fees (over 900 members). 2016 Goal to Grow TIF to \$7.64 million in 2016. Leverage funding through partners to \$825,000; Special event department has launched three new festivals in 2008 to drive shoulder season.	No ongoing core budget; monies are "tourism project based" (with built in admin); <b>2012:</b> FT Salary for Tourism Coordinator provided by Fundy Nat. Park; <b>2016:</b> \$850,000 Fed & \$120,000 from Prov & Village for tourism revitalization project (Village made application)	Approx. \$370,000-\$425,000/year; Funding comes from Tourism PEI, membership dollars, ACOA and Co-Op marketing initiatives.
13	<b>Tourism Vision</b>	To be "A bold and disciplined marketing organization committed to the growth of our tourism economy and the curation of our brand."	To ensure Alma is a community which foremost serves the aspirations of its residents while welcoming visitors from around the world with experiences that exceed expectations.	The go-to vacation destination on Canada's East Coast for families & friends to reconnect.
14	<b>Tourism Plan Goals</b>	2015-16: Well defined goals and objectives: 1. Generate Year round demand (i. Grow winter & shoulder visitation; ii. Defend summer revenue); 2. Lead with Brand (iii. Build destination brand alignment; iv. fuel traveler advocacy); 3. Strengthen Industry Alignment (v. Work together as a destination; vi. Develop partnerships to increase marketing effectiveness); 4. Operate a Performance Based Business (vii. Promote employee effectiveness; viii. Optimize investments).	The STEP plan was the original plan that outlined goals and led to current funding of: 1. a spatial plan (Phases 1, 2, 3 -- now in Phase 1); 2. branding strategy (to be unveiled for 2017); 3. Tourism business incubator space (in new multi-use building), 4. brand development. Now serving as a model for area to see what can be achieved through STEP. Also goals to: 5. involve other Albert County Villages, and 6. have Fibre Op for area -- to extend to St. Martins, Fundy Trail Parkway.	Well defined goals and objectives: 2014-2017 1. Consistent positioning and branding; 2. improved infrastructure for meetings; 3. promotion of Cavendish Beach golf product; 4. celebrate Lucy Maud Montgomery; 5. work more closely with Parks Canada; 6. capitalize on new events for Music Festival site, 7. target more mature demographic, multi-generation families, higher income adults; 8. Strategy to increase M&C (Meetings & Conventions).



	Dimension	Destination		
		Banff and Lake Louise, AB	Alma, NB	Cavendish (Resort Municipality), PEI
15	<b>Tourism Development Outcomes</b>	2016: Tourism development boom spike -- more building permits than in previous five years. 2015 site guidelines for Lake Louise Ski Area developed by Parks Canada in collaboration with the ski area include major gains in conservation, visitor experience and education with the return of some conservation land to Parks Canada.	2013-14: PC provided a FT Tourism Coordinator on secondment for two years to implement the STEP tourism plan; 2016: tourism revitalization project to include: beautification/ signage, a new museum, tourist information centre, commercial space for new business; attempt to draw more accommodations.	Revamped Cavendish Music Festival Site; M&C strategy developed;
16	<b>Tourism Policies/ Development Guidelines</b>	Many policies and development guidelines established by the Park and the Town of Banff -- but not the DMO. E.g. Town of Banff land Use Policy; Business License application: Licensing fees for businesses; some capacity limits on specific sites in the Park.	Rural Plan adopted in 2013 to: enhance and conserve the rural character of the area, to promote tourist development and to ensure sound management of the environment. <a href="http://www.nbse.ca/media-planning/library/A-BL93-RuralPlanBylaw.pdf">http://www.nbse.ca/media-planning/library/A-BL93-RuralPlanBylaw.pdf</a>	Jan 2016 - 1. looking to develop policies for dangerous properties, noise and loitering; 2. Work to aid new investors to the area and protect the area's reputation and service levels --> has developed a strategy to address this.
17	<b>Environmental Guidelines</b>	Many policies established by Banff National Park - including: 2015: Lake Louise Ski Area Site Guidelines for Development and Use - Banff National Park	Responsible Tourism (mentioned as guiding principle in plan) is promoted	Policies expected for Park, which takes in the coastal areas of Greenwich, Dalvay, Stanhope, Brackley and Cavendish, received "poor" ratings for: 1. forest eco-system, 2. declining species at risk, 3. lack of cultural resources management, 4. poor participation in learning opportunities, 5. aging infrastructure, 6. coastal erosion, and 7. ongoing inability to collect entrance fees. <i>PEINP: State of the Park Assessment (2015) Draft for Discussion (July)</i> . Cavendish Beach Tourism Association to work with PC on finding solutions for relevant issues.



	Dimension	Destination		
		Banff and Lake Louise, AB	Alma, NB	Cavendish (Resort Municipality), PEI
18	<b>Regional Marketing Tactics</b>	Region is collectively marketed; TIF has enabled media relations programs around the globe; BLLT has developed a full e-marketing team with e-based marketing programs for its 900 members.	Website currently being upgraded to be mobile app. friendly and will eventually reflect upcoming brand. Facebook and Twitter almost exclusively used. Brand strategy forthcoming	Region is collectively marketed; New 3-year marketing strategy to be released Summer 2016; Extensive use of online channels; consistent use of Cavendish Beach Brand.
19	<b>Brand -- Positioning &amp; Tagline</b>	Website: " <i>This Place is Alive</i> " - Brand Strategy: To persuade Free Spirits, Cultural Explorers, Authentic Experiencers and Gentle Explorers to visit Banff & Lake Louise, " <i>we are selling moments of indelible awe. We will do this in a way that is classic and inspired and when we are successful we will be described as uplifting, accessible, vibrant, jaw-dropping, protected and truly Canadian.</i> "	New brand to be completed 2017. <b>Current:</b> " <i>Home of the Highest Tides in the World</i> " (Alma website); Positioning: <i>the hub of visitation in the Upper Bay of Fundy</i> ; Famous for variety of seafood chowders	New Brand to be released Summer 2016; <b>Current Brand:</b> " <i>Lovin' Cavendish Beach</i> " cavendishbeachpei.com website; <b>Positioning:</b> <i>Canada's leading coastal and beach destination</i>
20	<b>HR Resources (Paid, Volunteer) for Coordination</b>	About 27 FT staff; Banff Ambassador Program (2 part course in 5 languages) is volunteer based; Visitor experience specialists hired annually; <b>Tourism Labour shortage</b> a problem; research done, recs. made 2015; <b>Short term:</b> 1. A tourism stream for the temporary foreign worker program; 2. Moving some occupations, including rafting guides, into the skilled labour category; 3. Investments and subsidies for housing; 4. Reopening the working holiday visa program; 5. Subsidies for public transit. <b>Long term:</b> 6. Immigration reform allowing a pathway to citizenship for lower skilled workers; 7. Expand and increase awareness of provincial employment programs; 8. Provide a guaranteed annual income	Fundy National Park provided support in the form of a secondment position for the first 2 years after the STEP plan. Currently: support provided by Town of Alma; new position (assistant clerk) created to help managing grant funding and make application for new grants, volunteers relied on for festivals and special events.	Ongoing funding required for core position (3 year funding from Prov.)- Solves the need for longer term funding, continuity and provides for a professional manager HR/staffing solution (coordination, capacity); 1 FT Destination Manager; 6 summer staff (VIC); Festivals have significant volunteers, including Cavendish Music Festival and Taste of New Glasgow (for PEI Fall Flavours)

	Dimension	Destination		
		Banff and Lake Louise, AB	Alma, NB	Cavendish (Resort Municipality), PEI
21	<b>Major Partners</b>	Banff National Park; Banff, Canmore & Jasper have teamed up to do an economic impact study.	Tourism stakeholders, Fundy National Park, Provincial Government, ACOA, Albert County Villages, Village of St. Martins, Fundy Trail Parkway.	Tourism PEI, ACOA, Parks Canada, Whitecap Entertainment and Cavendish Beach Golf
22	<b>Communication, Transparency, Accountability</b>	Communication to members is paramount for BLLT. Weekly electronic newsletter is monitored for click through and opening rates; regular focus groups, monthly hotel meetings, briefings for Town Council meetings. Accountability is critical, as a membership-based organization. Have a senior person in tourism as director of member services.	Ability to easily communicate with stakeholders since the sphere is small -- but it is expanding with links to the Albert County villages and St. Martins at the opposite end of the Parkway.	Communication and research have a high priority with members; monthly newsletter
23	<b>Main Challenges</b>	1. Parking and congestion in Town of Banff and Lake Louise (Solutions to date: green light overrides to decrease traffic delay times and shuttle buses from Town to popular sites); 2. Balancing increasing visitor numbers with capacity --> working with Parks Canada on this (esp. in light of Free entry to all National Parks in 2017); -->Joint marketing encouraging people to come in shoulder seasons; (Articulated need by Industry and Parks to work together to create solutions to capacity issues.). HR challenges as per previous page.	1. Ongoing funding; 2. HR -- getting help and paying them what they're worth; 3. Capacity issues for 2017 (free entry into park) -- currently at capacity with accommodation, water issues, garbage pick-up issues; 4. lack of continuity with Park management.	1. Training foreign owners re: visitor expectations;



## Appendix D: Atlantic Canada, NL and Western NL and Resident Tourism

### Atlantic Canada: Tourism Overview

Throughout Atlantic Canada in 2015, the tourism spending of non-resident visitors generated \$5.3 billion in total for provincial economies; supported more than 9,600 businesses and 57,000 jobs, and contributed 4.2% of the Atlantic Region GDP.<sup>8</sup> Rooted in the *ACOA Growth Strategy for Tourism: The Right Products Drive New Demand*, ACOA-Tourism Atlantic has a goal, vision, mission and clear objectives to grow this economic sector.

The Conference Board of Canada projects visitor arrival and revenue increases for Atlantic Canada to 2018 (**Table D-1**). Non-resident travel increases are anticipated to be led by China, with a 2% increase from the US (depending by exchange rates and economic factors). NL is anticipated to increase most of all Atlantic Canada provinces.

**Table D-1: Travel Outlook for Atlantic Canada to 2018**  
**Short & Medium Term Outlook Percentage Growth**

		2015	2016	2017	2018
NL	Visits	0.3%	1.8%	2.1%	3.5%
	Revenues	1.9%	5.0%	5.0%	5.9%
NS	Visits	2.0%	2.3%	1.9%	1.4%
	Revenues	4.2%	5.0%	4.5%	3.9%
NB	Visits	2.5%	2.1%	1.9%	1.5%
	Revenues	1.6%	4.6%	4.4%	3.9%
PE	Visits	2.5%	2.2%	3.2%	1.6%
	Revenues	4.5%	4.7%	6.8%	4.0%

Source: Conference Board of Canada, 2015.

While current numbers are not available, residents are the biggest source of visitation within each province (both local residents travelling locally, and Atlantic Canadians traveling within Atlantic Canada).

### Atlantic Canada Target Audiences & Profiles

The Atlantic Canada Tourism Partnership (ACTP), of which Newfoundland and Labrador is a partner, conducts active marketing and sales programs in the New England and the Mid-Atlantic US states and in the United Kingdom to promote measurable visitation to the province (**Table D-2**)<sup>9</sup>

<sup>8</sup> Source: ACOA-Tourism Atlantic, 2016.

<sup>9</sup> Details of all marketing efforts are available online [www.actp-ptca.ca](http://www.actp-ptca.ca).

**Table D-2: US and UK Markets for Atlantic Canada**

**US Focus:** New England and Mid-Atlantic – the northeastern US—three key audiences:

- *Exurban Explorers* (affluent, middle-aged to older, primarily couples)
- *Outdoor Experiencers* (younger to middle-aged couples, some with kids)
- *Young Families* (affluent and travel with children still at home).

**US Marketing tactics:**

- consumer advertising in research-driven offline and online media,
- partnerships with tour operators to reach customers and encourage visits here,
- active media relations program, generating profile for the region in influential publications (print and online).

**Overseas Focus:** United Kingdom.

**UK Marketing Tactics:** In the UK, ACTP focuses on strategic advertising to consumers as well as media and travel trade efforts.

## ● Newfoundland and Labrador

Tourism is a growing economic sector worth a total of a billion dollars annually to the Province. Tourism performance indicators for 2015 are shown in **Table D-3**.

**Table D-3: 2015 NL Tourism Performance<sup>10</sup>**

- **Non-resident visitation:** 503,100, up 0.9% (year over year)
- **Non-resident expenditures:** \$493 million up marginally.
- **Non-resident air travel:** St. John's decreased by 1% but is still the largest segment of the market of overall air travel; Deer Lake Regional Airport increased 1% and Gander increased by 25%
- **Marine Atlantic:** 96,838 non-residents, 4% increase – the first increase in passengers in five years.
- **Roofed accommodation occupancy:** dropped marginally from 50.8% to 50.7% in 2015 but average daily rate increased by 1.8% overall to \$134.79.

The provincial tourism industry has a stated vision to be a leading tourism destination, based upon NL's authentic and exotic experiences as expressed through its people, culture and natural environment. Outlined in the document, *Uncommon Potential*, the industry targets are to "double tourism revenues by the year 2020" to \$1.6-billion. As Gros Morne is the leading rural destination in the province, achievements toward the provincial goal "means business" in the region.

The tourism vision identifies seven strategic priorities to drive growth, all of which are important as GM Region strategically builds tourism. The strategic priorities are:

- Private public leadership

<sup>10</sup> Source: Preliminary Results, 2015, NL Department of BTRCD.

- Sustainable transportation network
- Market intelligence and research
- Product Development
- Tourism technology
- Marketing our Brand
- Developing the workforce.

## Newfoundland and Labrador Visitor Profile

Newfoundland and Labrador relies upon an in-depth study, an Exit Survey, of non-resident visitors to the province on a (somewhat) regular basis to provide visitor details. During calendar year 2016, NL Tourism is conducting a fresh Exit Survey of non-resident travellers which will be available in mid-2017; until then we profile non-resident visitors based upon the Exit Survey of 2011 compared and balanced with annual tourism indicators.

The **2011 Exit Survey of Non-Resident Visitors** to the province (most recent year available) provides a wealth of information on visitors for tourism planning. This information is insightful as it represents opinions and input expressed by visitors themselves, more than 17,000 of them visiting Newfoundland during peak season (May to October) in 2011. Key information about non-resident visitors which inform elements of the Strategic Tourism Plan is shown in **Table D-4**.

**Table D-4: NL Non-Resident Visitor Profile (2011)**

- **Trip Purpose:** Of the 460k non-residents who visited NL in 2011, 34% travelled for a pleasure trip, rather than to visit friends and relatives (VFR). Exit Survey information confirms that a guest visiting on vacation spends more money and stays longer in the province than the visitor traveling to visit friends and family. Tourism grows with vacationers!
- **Season of Travel:** The majority travel for pleasure during the peak season, identified by NL Tourism as May to October.
- **Age & Education:** Visitors to NL are generally older with almost 50% between the ages of 45 and 64. Visitors are predominately university educated and affluent people travelling as couples or singles. They fit the description of adventurous and “explorers” interested in communities, history, authentic cultural experiences and nature.
- **Geographic Origin:** Ontario: 35%; Maritimes: 27%; Other Canada: 25%; USA: 9%. Consistent and similar throughout Atlantic Canada.
- **Online Information:** Visitors increasingly research, communicate with destinations and make travel decisions based upon information readily available online which is presented in ways relevant to them.
- **Transportation Access:** 79% of non-resident visitors flew to the province—more than 70% through St. John’s Airport; 21% arrive in their own vehicle using the Marine Atlantic service (2011).

The **Canadian Non-Resident Travel Motivational Study, 2014** offers some insights into the future motivations and interests of Canadians to travel to Newfoundland and Labrador, up to and including 2017. Key information is shown in **Table D-5**.

**Table D-5: Motivations for Canadian Non-Resident Travel to NL (2014)**

- It is estimated that 3 million Canadians are predisposed to visit NL in 2016 and 2017.
- More than 53% of Canadians can recall a media advertisement on NL, highest advertising recall among Canadian destinations. All advertising directs visitors to [www.newfoundlandandlabrador.com](http://www.newfoundlandandlabrador.com) for further information.
- Canadians seek experiences! 67% seek pleasure walking, 65% enjoy history, 61% want to enjoy local culture and people and 52% want to experience local festivals and events.
- 53% of Canadians make NL travel arrangements in advance.
- 30% state they are seeking new and unique places to visit.

Non-resident visitors to the province travel primarily during peak season and are the most lucrative of visitors. As noted above, resident Newfoundlanders make up the largest number of visitors, if not the biggest spenders, and travel throughout the year.

## • Western Newfoundland Tourism

The Western Newfoundland Destination Marketing Organization (DMO) stated goal is to increase economic development returns through tourism in Western. Working with industry representatives the DMO has concentrated efforts in the 18 months to detailing for Western NL a destination development report—*Tourism Destination Visitor Appeal Appraisal: Western Region*-- to guide activity in the years ahead. Identifying the Gros Morne area as “one of the most recognized places in the country”<sup>11</sup>. The report articulates 21 Key Findings to grow tourism; of particular interest to the GM STAR effort are:

- Developing the untold stories of the western region...into new people/program based visitor experiences
- A concerted effort to grow overnight visitation within communities in GMNP, in June and September
- Opportunities to strengthen and market winter tourism
- Innovative visitor servicing solutions ... while travelling along the west coast
- Better leveraging social media to drive visitation and revenues.

Input gathered in recent months has distilled the findings into eight priority opportunities the first 5 of which are:

1. Increase the tourism market through festivals and events
2. Using levy group funds to effectively grow tourism

<sup>11</sup> Tourism Destination Visitor Appeal Appraisal: Western Region. Date??

3. Improve the sense of arrival at key entry points
4. Advance winter tourism
5. Strengthen the visitor experience among 3 UNESCO sites in the Viking Trail.

## Western Newfoundland Visitor Profile

The provincial Exit Survey 2011 contains a companion profile of visitors to Western Newfoundland. Salient information about non-resident visitors to Western Newfoundland informs this plan and is shown in **Table D-6**.

**Table D-6: Western NL Visitor Profile (2011)**

- **Travel Motivator:** Western Newfoundland is a travel motivator to the province; more than 23% of all non-residents coming to NL visit the Gros Morne area.
- **Overnight Stays:** Gros Morne records the most overnight stays of any rural location in NL with 200+k people visiting GMNP in 2015.
- **Non-resident visitor spending:** Higher in the western region than the provincial average. In 2011 visitors spent on average of \$1,751 per travel party in NL; those who travelled to western NL spent more than \$2,200 per party in NL
- **Age & Education:** Visitors are generally older, educated and affluent people travelling as singles/couples
- **Season of Travel:** The majority travel for pleasure during the “peak season” identified by NL Tourism as May to October
- **Geographic Origin:** Ontario: 35%; Maritimes: 27%; Other Canada: 25% USA: 9%.

Visitors to Western Newfoundland and Labrador travel for experiences that are authentic and natural, steeped in history and culture and are often unique and “bucket-list” activities and visits. The most popular vacationing interests of non-residents to NL compared to Western NL are shown in **Table D-7**. Many categories reveal a higher incidence of participation for visitors to NL in many categories.

**Table D-7: Visitor Interests NL vs Western NL<sup>12</sup>**

Non-Resident Primary Interests	Overall NL	Western NL
<i>Primary Activities</i>		
• Scenic Touring	67%	74%
• Walking in Communities	64%	70%
• Trail Hiking	32%	46%
• Guided Tour	11%	16%
• Visit National Park	34%	59%
• Fishing (not guided)	8%	9%
• Fishing (guided)	2%	4%
• Freshwater canoe/rafting	2%	4%
• Hunting Game	1%	2%
<i>Primary Attractions</i>		
• Crafts and Gift Shops	54%	64%
• National Hist Sites	51%	57%
• Museums/ Archives	37%	43%
• Visitor Info Centers	37%	56%
• Other Shopping	36%	37%
• Live Music/ Concerts	21%	22%
• Festivals and Events	16%	16%

## Visitor Profile: In-Province Travel by Residents

**The 2010 Resident Travel Survey** (most recent year available) developed for NL Tourism provides some details regarding in-province travel by residents of NL, within the province. Far more trips throughout the province are reported by residents than non-residents, but the spending is considerably less per trip and the trips shorter. However, like everywhere else in Atlantic Canada, resident travel is an important revenue generating segment of the tourism industry.

**Consistently 55-60% of the province's overall tourism revenue is generated by Newfoundland and Labrador residents travelling within the province.**

The **Resident Survey** noted on the previous page helps us understand that:

- Newfoundlanders and Labradoreans love to travel! 77% have taken a trip somewhere in the last 2 years and 64% have travelled in-province.
- NL residents account for more than 4.1 million party visits in 2010 in Newfoundland and Labrador, spending \$575 million. Importantly, this is less seasonally affected than travel by non-residents.

<sup>12</sup> 2011 NL Exit Survey.

- The most popular region for in-province trips is Western Newfoundland with 52% choosing to visit there. Parks Canada information consistently reports that one-quarter of its annual visitors are residents of NL.
- Residents reportedly enjoy scenic touring (46%); shopping (36%); and trail/ wilderness hiking (27%) as chosen activities.
- Although July and August are the far most popular vacation months, in-province travel is less seasonal; **50% of residents who want to travel say they do/ would over multi-seasons**. The survey indicates that off-season travel can be motivated by pricing/ discounts and packaging and indications are that snowmobiling influences winter travel.

## Cruise Activity: Western NL & GM Region

Cruise activity in NL is described as “solid” for 2015<sup>13</sup>, despite a provincial decline of 4% in overall passenger arrivals. Bucking the provincial results however, Corner Brook ship arrivals in 2015 increased to 12 ship calls (from 8 in 2014) and passengers grew to 10,500 people from 8,600 the previous year. Importantly for GM, NL is experiencing an increasing number of smaller, expedition sized cruise ships.

Led by efforts from GMNP, the GM region is considered a “big selling factor” in attracting cruise ships to Corner Brook and is an active member in Cruise Association of Newfoundland and Labrador (CANL). The Western DMO reports that each cruise ship purchases shore excursions for one to four motor coaches (estimated 45 to 250 passengers); on average 150 people per ship. The DMO reports consistent enthusiasm among cruise lines for visits to GMNP pending certain considerations: 1. the visit is a day-long excursion requiring space/ services to provide lunch for visitors, and 2. motor coach availability is sometimes limited. The vast majority of shore excursions travel to the north side of the park, visiting Norris Point waterfront, Rocky Harbour (with lunch at Ocean View Hotel), Visitor Centre, Lobster Cove Head Lighthouse and stop for photographs.

Two shore excursion tour operators -- Wildland Tours (head office in St. John's) and Atlantic Cruise Ship Services (head office in Halifax) handle most of the Corner Brook cruise business and are primary contacts for details and arrangements. Cruise ship passengers, travelling independently will visit Gros Morne, especially when there is a big ship in town; either renting a car, taking a taxi from dockside, or using a private tour operator. These are typically groups of 2 to 6 people.

<sup>13</sup> Source: Department of BTCRD, 2016.

## Appendix E: Brief Context for Plan Recommendations

Refer to section Strategic Recommendations and Tactics for details associated with each Recommendation.

### 1. Validate and endorse its Tourism Vision and Goal (p. 19) and “live them” to the benefit all visitors as well as the regional and provincial economy.

**GM Today:** As a leading tourism destination in Atlantic Canada, GM through development of major strategies has “looked to the future” and has described fundamental elements of a tourism vision. The visions outlined in the *Management Plan for GMNP*, the provincial tourism Vision 2020, *Uncommon Potential*, the picture of the future painted in the *GM Cultural Blueprint* and the *National Stakeholder Engagement Strategy*, and the *Destination Development Plan for the Western NL Region*, all informed the development of the *Vision for GM Region* outlined above.

### 2. Create an industry-driven, regional Tourism Coordinating Team, with staff support from a Tourism Specialist.

**GM Today:** Consultation on projects and initiatives is a way of doing business in the Gros Morne area. With many projects, events and initiatives underway and in discussion, there is persistent demand for consultation and community input. The Gros Morne Cooperating Association (GMCA) is the de facto “tourism champion” for the Region, the incubator of ideas and “glue” for projects; it is, and the *go-to* group for tourism information, coordination and securing funds for projects. With so many projects and initiatives underway, prioritizing efforts and effective consultation can become awkward. With STAR program recommendations soon to be in the mix, an opportunity exists to **streamline consultation on regional issues** and to prioritize and plan initiatives from a regional vantage point.

### 3. Communicate, cooperate and partner among regional stakeholders in relevant and profitable ways suggested in the Plan, by committing to an annual regional Tourism Forum and systemic networking effort to ensure a strong culture of communication.

**GM Today:** Consultations for this plan strongly revealed a demand and business need for ongoing and comprehensive, broad communication among operators, businesses and communities, GMNP and pinpointed that key partnerships are critical to success. Open, two-way and consistent communication is an effort that is ongoing and demands management; it can be lost amid the pressure of deadlines and project execution. Systemic communication is recommended in this regional plan to nurture a “culture of communication”.

**4. Build evolving, and meaningful tourism experiences region-wide, by optimizing available industry education resources and market-readiness tools to extend visitor stays and increase expenditures.**

**GM Today:** Visitors seek memories and experiences which are personally rewarding, satisfying and insightful and repeat visitation is encouraged by the offer of evolving, expertly developed experiences. The Gros Morne Institute for Sustainable Tourism (GMIST) is recognized as a Canadian leader in experience development; it's an "ace in the hole" for capacity building and training in the region and is central to helping Gros Morne achieve this objective. The BBMS is a singularly valuable resource to the area, with unique focus, prime waterfront location with latent, yet prime potential for tourism.

**5. Recognize tourism-related environmental practices as: 1. valuable and profitable for tourism growth, and, 2. as a way of competitively positioning the destination -- in line with the regional Vision, Parks Canada's philosophy and destination status as a UNESCO World Heritage site.**

**GM Today:** The GM Region's special ecology and environment are recognized by UNESCO, the National Park, visitors and residents as key to its stature and success as a tourism destination. To meet visitors' expectations, it is critical that enclave communities and operators fulfill the "promise" of environmental stewardship and implement environmental practices, support the integrity of the Parks Eco-System Management Plan, and build upon past initiatives and successes. In 2008, Parks Canada, all seven enclave communities and GMCA began this conversation with a Sustainable Tourism Accord outlining initiatives to establish an environmental standard in GM region. The issue of environmental sustainability remains top of mind in GM and residents reinforced the need to protect and enhance the natural environment and cultural assets in a survey conducted to develop this plan.

**6. Extend the tourism season, by planning strategically -- beginning with a November 2016 workshop aimed at extending June and September periods.**

**GM Today:** The GM Region enjoys healthy and profitable visitation during the high season months of mid-June to mid-September and then struggles to generate desired visitation in the shoulder months – primarily early June (following the TTT "bump") and late September/October. Services are limited at these times of year yet infrastructure and experiences exist to support an extended season. As well, winter tourism is considered by some to be a lost opportunity for the region. Active efforts are underway to build upon events for season extension.

**7. Continue to market the region as a single destination; dedicate additional human and financial resources and a prioritized work plan, to, focus on online tactics and Brand development.**

**GM Today:** Effective and focused marketing – speaking to visitors with one voice and making it easy to appreciate the overall opportunities of a visit here “at a glance” in relevant ways-- is critical to tourism success. As a “best practice destination” Gros Morne will embrace strategic marketing principles, especially as they pertain to online efforts. The *Western Destination Development Plan* identifies focused online effort as the priority for immediate attention. In 2015, 2.6 million people visited [www.newfoundlandlabrador.com](http://www.newfoundlandlabrador.com). Revenues will result from coordinated marketing of GM outstanding and award-winning efforts; by harnessing the strong foundation that is now established with the de factor destination website, [www.visitgrosmorne.com](http://www.visitgrosmorne.com) and its associated sites and by forging new marketing partnerships. GM region is the most visited rural destination in NL and pent up interest exists in the destination; no area will benefit more from a powerful and coordinated strong online presence. connections with [www.newfoundlandlabrador.com](http://www.newfoundlandlabrador.com).

**8. Monitor progress and report results in specific ways suggested in the plan to measure the effectiveness of the plans recommendations.**

**GM Today:** Other than those employed by Parks Canada and private sector operators, there are few formal success measures for tourism in the Region. The GM Region Strategic Tourism Plan needs to articulate success measures that make sense to tourism stakeholders and are reported in honest and straightforward ways, on a regular basis and used as information for improvement moving forward. “If you can’t measure it, you can’t manage it!”

## **Appendix F: Recommended Gros Morne Regional Tourism Management Framework**

A **regional Tourism Coordinating Team (TCT)** should be recognized as the conduit for regional tourism planning in GM, including recommendations and implementation of the Gros Morne Region Strategic Tourism Plan. The TCT is in place by October 2017.

### **Terms of reference for composition of the Gros Morne Regional TCT:**

- Workable Size: 8 to 10 people
  - Sub-committees may be needed and should include appropriate participants from throughout the region.
  - Includes representation from GMCA, GMNP and MUN
  - Secretariat for TCT is collaboratively provided by GMNP and GMCA.
- Identify a Chair/Champion
- Term of 2/3 years as determined in advance of October 2017
- “Small Team/ Big Thinkers”. Members must be “big thinkers” who can take a regional perspective and understand the Vision for regional tourism and the Plan; each is able to envision what overall efforts can deliver to the region in the long term.
- Representation: by geography and sector with a knowledge/ appreciation of the region as a whole
- Each must speak for the region and be influencers to rally the troops as required
- Visitor focus is imperative and time to commit to TCT is important
- Meet on a regular basis aligned with deadlines associated with TCT roles (outlined below) or as issues demand.

TCT Roles include but, over time, are not exclusive to:

- Lead on regional tourism priorities; and “speaking for” regional tourism efforts
- Hire and supervise Regional Tourism Specialist (see below)
- Direct/ lead regional tourism activities such as Tourism Forums, surveys and special projects
- Advise on regional industry communication and concerning tourism among stakeholders and partners
- Advise on product development efforts
- Advise on regional marketing efforts
- Monitor/ communicate updates of the Asset inventory and Tourism Action Framework
- Monitor and report on successes, benchmarks and shifts in the tourism landscape
- Advise on rationalize and optimization of use of significant, existing infrastructure
- With Tourism Specialist, develop an annual work plan outlining priorities, deadlines, resources and partners required, progress indicators and industry/ stakeholder communication efforts.

- Needs secretariat/ coordinating assistance – “boots on the ground” in the form of a *Regional Tourism Specialist*; this Secretariat is collaboratively provided by GMNP and GMCA.

A **Regional Tourism Specialist (TS)** reports to and supports efforts and priorities of the TCT. The TS is in place no later than January 2018. The TS is knowledgeable about tourism throughout the GM Region, Western Region and NL; experienced in tourism management and skilled in online marketing. Experience in working with an advisory committee environment is beneficial.

To 2020, the position is provided from the existing resources of GMNP and GMCA to a value of \$50,000 including expenses per year. The Tourism Specialist’s primary efforts are devoted (50%) to regional tourism initiatives as outlined in this Plan and (50%) to online regional marketing responsibilities.

## Appendix G: Gros Morne

### Tourism Action Framework: 2017 – Requires Annual Update

A snapshot of new and ongoing community initiatives and program enhancements for 2017  
(at November 2016)

Item	Overview	Project Proponent	Budget & Funding	Estimated Timeline	ACTION
<i>Waterfront Development: Rocky Harbour</i>	Extend boardwalk, lights & studio space	Town	\$1.5 million	Begins Spring 2017	ATTN: Work projects through 2017 season
<i>Boat Building Project: Rocky Harbour</i>	Details to be outlined	GMCA			Pilot Programming: 2017
<i>Recycling Center</i>	For Woody Pt & Rocky Hrb	Towns		2017	Plans developed. <b>When??</b>
<i>New Community Center: Glenburnie</i>	Multi-use; Replacement	Town			Plans & cost estimates by end 2016. <b>Is it approved???</b>
<i>International Appalachian Trail</i>	Designation	Community group			Slow process with undetermined deadline
<i>Global Geo-Park Proposal: Trout River/GBS/Woody Point</i>	UNESCO designation “Cabox”; defines exceptional geology	Geo-Park Committee		Estimated: 2018 TBC	Undetermined deadline.
<i>New Theatre: Cow Head</i>	Plans in hand; locations ID’ed for 200 seat performance site	Theatre NL	Cost up to \$5million; \$1m fund-raising required		Anticipated start: Spring 2017
<i>Beautification Plan: Cow Head</i>	To complement new theatre	Town	Up to \$500,000		Anticipated start: Spring 2017
<i>Discovery Center Enhancements: GMNP</i>	Renewal of exhibit to focus on GMNP geological significance & WHS status	Parks Canada	Budget: \$500k	Ready for 2017 season	Exhibit design underway; fabrication & install in winter/spring 2017.
<i>Mobile Visitor Servicing: GMNP</i>	Second “wrapped” van will travel thru high traffic areas daily with visitor info	Parks Canada		Ready for 2017 season	Second vehicle ordered; goal to be on the road at beginning of season 2017
<i>Infrastructure Updates: GMNP</i>	Road work; trail upgrades; upgrades to Green Pt. campground & Western Brook Pond	GMNP	Total: \$44million	2016-2018	Work underway on most projects; construction in 2017 and 2018

Item	Overview	Project Proponent	Budget & Funding	Estimated Timeline	ACTION
<i>Free Admission: GMNP</i>	Free entry to parks and sites; special events and initiatives	Parks Canada	n/a	Throughout 2017	Agency goal: increase visitation x 10% nation-wide
<i>Crafter's Residency</i>	Partial funding approved and full anticipated for 2 Craft Residents, winter 2016/17	Creative Gros Morne (CGM)		Winter 2016/2017. Open to all and to be advertised on VOBB.	Residents working extensively with local craftspeople; 2-day workshop + mentoring + school visit for each.
<i>Dance Residency</i>	Dance resident in GM for September and October 2016; again in 2018	CGM		September – October 2016	Dance workshops and seminars. Open to the public.
<i>IN DISCUSSION - Dance Film Project</i>	Scouting underway for potential film project about locals dancing in homes.	CGM with Dance Resident		Possible 2017; Probably 2018.	Details to be determined.
<i>Outdoor Art Project</i>	During 2017, two outdoor art projects will be produced in GMNP.	Creative GM	150 <sup>th</sup> celebration funding	Completed in 2017	Curator hired. Call for proposals circulated. Two pieces to be designed and built in '17.
<i>New Product: Food Tours</i>	"Progressive dinner" tours of 4 locations; initiated in 2016 from July to September.	Private Operator			Based upon lessons learned in 2016; plans for strategic expansion in 2017
<i>Chef in Residence Program</i>	Piloted in 2016. Chef onsite for 3 days in the fall for activities with businesses and GMIST	GMCA		Fall 2017	Details and dates TBC
<i>Plan for Mountain Biking: GMNP</i>	Overall plan for mountain biking opportunities & trails	Parks Canada		2018	Project deferred to 2018 due to work on hiking trails 2017
<i>BBMS Operational Review: Norris Point</i>	First review since 2004	BBMS (MUN) & GMCA		2017	Review underway of operations
<i>"Boat Tour" Transportation Link: Trout River</i>	Boat connector from TR: TBC. RFP in 2016 did not result in an operator.			Anticipated for 2017	Second Call for Proposals will be made in fall 2016 for 2017 Service
<i>Writers' Festival: Woody Point</i>	Included a Comedy Festival in 2016	Writers' Festival			Plans underway to continue in 2017 with host Steve Patterson

## **Appendix H: DRAFT Gros Morne Commitment to our Guests**

Gros Morne National Park, its seven unique enclave communities and the residents and businesses who thrive here, are committed to delivering to/ building with you, our very special Guest, a personal and memorable “Gros Morne story” inspired by this extraordinary landscape and rich, cultural vitality.

As a region of committed tourism experience providers, we work every day to exceed your expectations and to earn our reputation as the signature rural destination in eastern Canada.

**Signed by: Towns/ partners/ businesses**

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### Notes for Discussion on the **Commitment to Our Guests:**

- It is a statement of common purpose, supports the Goal of the Strategic Tourism Plan and is a strong reinforcement to the Gros Morne brand pillar of “extraordinary”
- Used voluntarily by operators; can be personalized by business
- Should become a staff training tool
- Use the word “guest” rather than visitor/ customer
- Circulate it broadly online and in materials!

## **Appendix I: Monitoring GM Success – Recommended Performance Benchmarks**

In partnership with the private sector, GMNP, GMCA, individual communities and the Province, GM should **strive to be a leader** in benchmarking for regions in Atlantic Canada. The performance measures should be delivered annually to operators during the Tourism Forum and distributed as required throughout the year. Information assembled forms the basis for a communications effort (on social media and with media relations) to reflect the growing tourism momentum in the region.

- **Provincial Information:** Working with NL Tourism, explore methods to extrapolate GM-specific information from provincial data, explicitly highlighting annual GM Region performance. Priority indicators are:
  - visitor numbers (nonresidents and residents),
  - length of stay and
  - associated revenues;
  - room/camping nights sold
  - seasonal occupancy;
  - relevant analytics to measure online activity/ interest in the region on provincial online channels;
  - editorial value generated from third party media.

Annually pursue with NL Tourism a method to annually “assign” high level economic impacts to regional tourism results.

- **Regional Information:** Working with Gros Morne National Park, BBMS and key festivals throughout the region mine more deeply activity in enclave communities. This is accomplished by:
  - reporting annual visitor numbers and activity
  - partner and sponsor participation
  - economic impact (where possible).

Attention should be paid to gather performance indicators for the May/ June and October.

### **Regional Programs:**

- Accelerated Market Readiness (AMR) 10 operators in 2017 & each year thereafter
- GMIST
- **Community Engagement:** Measured through:
  - Attendance by at least 60 at the annual Tourism Forum (using 2016 as benchmark year);
  - Attendance by at least 10 operators at the annual Experience Refresher Workshop conducted by GMIST (2017 is benchmark year);
  - Participation by 20 operators in World Host training and 10 in Accelerated Marketed Readiness (AMR) beginning in 2017.

Continued...

- **Regional Marketing Efforts:** Measured through:
  - marketing budget allocated (vs yield)
  - year-over-year investment by communities in regional marketing efforts beginning in 2017
  - links to regional operators and activities
  - customer visitation/ views and bookings (where appropriate) on regional marketing efforts and platforms
  - growth and development of database for future marketing efforts.
  - operator buy-in to regional marketing programs.

## ***Appendix J: Considerations: Developing a Business Case and Contributions for Enhanced Online Investment***

A strategic work plan to **enhance Gros Morne’s online presence** is the responsibility of the Tourism Specialist, reporting to the TCT, and is due for completion end of Q1-2018; this investment will drive the business case and funding model for enhanced local investment. The intent is that TCT would sign off on the work plan and funding formula in 2018 and lead its implementation for 2019. The total targeted investment is (the value of) an incremental \$5,000.

Investments can be:

- Dollars committed by communities, organizations and businesses to the budget for core regional online efforts i.e. [www.visitgrosmorne.com](http://www.visitgrosmorne.com) as the “destination” website and social media efforts that are regional in nature;
- Strategic investments by communities, organizations and businesses in their own websites and social media channels, to effectively support, link and extend the reach of online efforts;
- Collaborative funding/ resourcing of special online projects that can be measured for impact and participation in the delivery of those projects;
- Collaboration on securing imagery (video and stills) of key features of each community and signature event, experience and attraction – a regional Image Bank; imagery that can be shared throughout the region-wide use;
- Commitment by communities, organizations and businesses to embed and utilize the key messages and future brand of GM Region (by 2019) in their own online channels.

It is suggested that a funding formula consider:

- An initial base financial commitment of \$500-\$750 by each of the 7 enclave communities as a gesture of commitment to the regional marketing “big picture”. An additional investment by community could be based per capita on population.
- The value of the investment made by each community, organization and business in their own websites to align with regional objectives.
- Contributions to a developing a regional Image Bank; formula could consider the attractions and experiences to be captured for the Image Bank.