

Prepared for:

**Mariner Resource Opportunities
Network Inc.**

Final Report:

**Carbonear Island
Development Strategy**



Prepared by:

**Facilities Design Group Inc.
in association with SGE Acres Limited**

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TABLE OF CONTENTS

EXECUTIVE SUMMARY	4
I INTRODUCTION	8
1.1 PURPOSE OF THE STRATEGY	8
1.2 THE SETTING.....	9
II CONSULTATION PROGRAM.....	11
2.1 INTRODUCTION.....	11
2.2 COMMUNITY INPUT	12
2.2.1 GAP ANALYSIS	12
2.2.2 INTERVIEWS.....	12
2.2.3 KEY STAKEHOLDERS SELF-ASSESSMENT SURVEY	13
2.2.4 COMMUNITY AND SECTOR GROUPS.....	17
2.3 VISION, STRATEGIC OBJECTIVES AND ACTION PLAN THEMES	19
2.4 LAND OWNERSHIP.....	20
III MARKET ANALYSIS.....	21
3.1 INTRODUCTION.....	21
3.2 THE CURRENT SITUATION.....	21
3.2.1 GLOBAL OVERVIEW.....	21
3.2.2 CANADIAN OVERVIEW.....	24
3.2.3 NEWFOUNDLAND AND LABRADOR CONTEXT	31
3.3 MARKET INSIGHTS.....	44
3.3.1 CULTURE AND HERITAGE TRAVEL	45
3.3.2 LEARNING VACATIONS.....	46
3.3.3 ADVENTURE TRAVEL AND NATURE-BASED TRAVEL	47
3.3.4 MOTORCOACH	48
3.3.5 RECREATION VEHICLE TRAVEL (RV TRAVEL).....	50
3.3.6 CRUISING	51
IV PRODUCT ASSESSMENT	53
4.1 INTRODUCTION.....	53
4.2 CARBONEAR.....	53
4.3 CARBONEAR ISLAND ARCHIVAL RESEARCH.....	56
4.3.1 WORK SCOPE	56
4.3.2 ARCHIVAL RESEARCH RESULTS	56
4.3.2.1 THE CIVILIAN FORTIFICATIONS (1690s - 1713)	56
4.3.2.2 CONSTRUCTION OF FORTIFICATIONS (C. 1740 TO 1762).....	58
4.3.2.3 POST-1763 (WITHDRAWAL FROM CARBONEAR ISLAND)	64
4.3.2.4 CONSTRUCTION AND MAINTENANCE OF LIGHTHOUSE.....	64
4.3.3 FIELD RECONNAISSANCE.....	64
4.3.4 SUMMARY AND CONCLUSIONS	66
4.4 EXTERNAL FACTOR ASSESSMENT	66
4.5 CASE STUDIES.....	68

4.5.1	Haida Gwaii, Queen Charlotte Islands, BC	68
4.5.2	Wanuskewin Heritage Park, Saskatchewan	71
4.5.3	The Cradle of Humankind, South Africa	74
4.6	The Evolving Role of Tourism – Focused Downtown Areas	78
4.7	Product - Market Match	80
V	Implementation Strategy	84
5.1	Introduction	84
5.2	Town Related Upgrades Action Plan	85
5.2.1	Tourist Expenditures and Expanding the Retail Base	89
5.3	Island Infrastructure & Site Services Action Plan	91
5.4	Signage, Image and Identity Action Plan	93
5.5	Marketing (Partnerships) Action Plan	98
5.5.1	Target Markets	99
5.5.2	Marketing Strategy	99
5.5.3	Marketing Approach / Tactics	99
5.6	Implementation (Management and Organization) Action Plan	103
5.7	Financial Plan	109
5.8	Economic Impacts and Benefits	114

LIST OF EXHIBITS

Exhibit 2.1	- Carbonear Island Development Strategy – Desired Level of Change	13
Exhibit 2.2	- Respondent Opinions On the Current “Balanced State” of Tourism Focus In Carbonear	14
Exhibit 2.3	- Priority Attractions	15
Exhibit 2.4	- Expenditure Priorities	15
Exhibit 2.5	- Organizational Challenges Ranked by Key Stakeholders	16
Exhibit 2.6	- Carbonear Consultations	18
Exhibit 2.7	- Harbour Grace Consultations	18
Exhibit 2.8	- Vision For The Strategy	19
Exhibit 3.1	- WTO Tourism 2020 Vision: Forecast of Inbound Tourism, World by Regions International Tourist Arrivals by Tourist Receiving Region (million)	22
Exhibit 3.2	- Visitation to Canada Volume of Tourists to Canada – 2002	24
Exhibit 3.3	- Top 10 Countries of Origin for Overnight Visitors to Canada – 2002	24
Exhibit 3.4	- Top 15 U.S. States for Overnight Visitors to Canada – 2002	25
Exhibit 3.5	- Travel to Canada by Province Visited - 2002	25
Exhibit 3.6	- Top Activities Participated in by International Tourists to Canada - 2002	26
Exhibit 3.7	- Most Popular Heritage Tourism Activities in Canada	26
Exhibit 3.8	- Place of Residence of Canadian Heritage Tourism Enthusiasts	27
Exhibit 3.9	- Canadian Heritage Tourism Enthusiasts Destinations Visited in Past Two Years	27
Exhibit 3.10	- Impact of 2026 Population Structure on Growth Rates	29
Exhibit 3.11	- Anticipated Differences in Tourism Activities by Place of Birth – 2026	30
Exhibit 3.12	- Annual Non-Resident Visitation and Expenditures Newfoundland and Labrador: 1994-2003	32

Exhibit 3.13 - Peak Season (June to September) Non-Resident Visitation and Expenditures Newfoundland and Labrador: 1993-2003	33
Exhibit 3.14 - Non-Resident Visitors Newfoundland and Labrador by Origin: Jan -Dec ..	34
Exhibit 3.15 - Zone 17 – 5 Year Accommodation Occupancy Data (1999 – 2003).....	34
Exhibit 3.16 - Profile of Economic Zones Visited by Non-Resident Air Visitors 1997 Air Exit Survey	35
Exhibit 3.17 - Profile of Economic Zones Visited by Non-Resident Auto Visitors 1997 Auto Exit Survey	36
Exhibit 3.18 - Characteristics of Auto Visitors – 1997 (From the 1997 Provincial Auto Exit Survey) % Party Visits & Party Nights & Average Stay	37
Exhibit 3.19 - Purpose of Trip %	37
Exhibit 3.20 - Origin of Trip %	38
Exhibit 3.21 - Group Composition %	38
Exhibit 3.22 - Age of Respondents %	38
Exhibit 3.23 - Education Level %	39
Exhibit 3.24 - Household Income Level %	39
Exhibit 3.25 - Annual Non-Resident Visitation to the City of St. John's: 1996 – 2002	40
Exhibit 3.26 - Non-Resident Visitation to the City of St. John's by Month: 1999-2002.....	40
Exhibit 3.27 - Non-Resident Purpose of Visit to the City of St. John's – 2002	41
Exhibit 3.28 - Activities of Non-Resident Auto and Air Visitors to the City of St. John's: 1997 Exit Surveys	41
Exhibit 3.29 - Estimated Demographic Profile of Non-Resident Auto & Air Visitors to St. John's: 2002 Based on 1997 Auto & Air Exit Surveys Percentages ...	42
Exhibit 3.30 - Provincial Historic Sites Visitation	43
Exhibit 3.31 - National Historic Sites Visitation	44
Exhibit 3.32 - Visitation to Other Attractions.....	44
Exhibit 3.33 - Bus Inbound Activity on Marine Atlantic.....	50
Exhibit 3.34 - Camper (Including RV) Inbound Activity on Marine Atlantic	50
Exhibit 4.1 - Market Evaluation Chart.....	81
Exhibit 5.1 – Estimated (\$2004) Per Day Tourism Expenditures	83
Exhibit 5.2 – Pedestrian Circulation	88
Exhibit 5.3 - Viability Indicators.....	91
Exhibit 5.4 - Five Phases of Organization Growth.....	104
Exhibit 5.5 - Management and Organization.....	105
Exhibit 5.6 - Recommended Annual Self Assessment.....	107
Exhibit 5.7 - Summary of Probable Costs (\$2004).....	111
Exhibit 5.8 - Proposed Implementation Schedule.....	112
Exhibit 5.9 - Template to Isolate Risk Exposure.....	113

APPENDICES

- Appendix A: Archival Research Project
- Appendix B: Call for Proposals and Terms of Reference
- Appendix C: Quebec Declaration on Ecotourism

Executive Summary



In 2003, Mariner Resource Opportunities Network Inc. (M-RON) signed an agreement with Facilities Design Group Inc., in association with SGE Acres Limited, to prepare a comprehensive tourism destination development strategy for Carbonear Island and the surrounding area. The initial phase of the study involved extensive stakeholder consultations. Organizations, individuals, businesses, tourism operators and heritage groups were given ample opportunity to share their vision for the Carbonear Island development strategy through public information sessions, meetings with targeted groups and individuals, surveys and written briefs. The vision, for the Carbonear Island Development Strategy, that resulted from the stakeholder consultations is:

Carbonear Island is an anchor" tourism project for the Baccalieu Trail that would preserve the Island's cultural and natural integrity and provide sustainable economic benefits for the Carbonear area.

A Vision can be defined as a "referred future". In this context, the following paragraph describes a vision of what visitors will see and experience in Downtown Carbonear and on Carbonear Island in, say 2010.

In 2010, Carbonear is the tourism anchor for the Conception/Trinity Bay area of Newfoundland. A sustainable development partnership between the community, senior levels of government, donors and learning institutions resulted in a consensus on the scale and type of development in Downtown Carbonear and Carbonear Island. When visitors enter Downtown Carbonear, they are greeted by an historic setting that contains a full range of modern visitor amenities. The architectural treatment of restored buildings, range of businesses, interpretative signage, waterfront boardwalks and coordinated parking are blended with a working downtown and harbour. The Downtown is the backdrop for Carbonear Island - the region's premier anchor project. In the centre of the historic downtown, visitors can watch live theatre and take a walking tour as part of the total experience. A regular schedule of trips to Carbonear Island takes place from an embarkation area beside the Rorke Store. Step-on guides are a requirement for all tours to the Island. These trips bring to life the history of the Island with interpretation programs while facilities on the Island are limited to protect the natural environment and heritage resources. The result is an experience that is authentic and has received international recognition.

An Implementation Strategy was prepared to move from conditions in 2004 towards the preferred future. The Implementation Strategy was crafted around five Action Plans:

- Town Related Upgrades including a Concept Plan
- Island Infrastructure and Site Services,
- Signage, Image and Identity including a new logo,
- Marketing (Partnerships), and
- Implementation (Management and Organization).

Carbonear is a community located on Newfoundland's Avalon Peninsula whose history includes pirates and princesses, French invasions and heroic resistance by the local settlers, ambitious, commercial success stories and sometimes a lucrative fishery. The common factor that ties together all the various aspects of Carbonear's history is the ocean. Originally, a fishing and trading community, Carbonear looked to the sea to provide a livelihood. When danger threatened, from pirates and privateers in the early 1600's and from the French in the late 1600's and the early 1700's, the people of Carbonear and the surrounding area withdrew to Carbonear Island, an island at the entrance to Carbonear Harbour. There, they were able to defend themselves.

Today, Carbonear Island is deserted. In spite of the fact that the Island received a National Historic Event designation in 1981, there is no development plan in place. Except for the occasional local summertime visitor, the Island that represented the last hope for English settlers in Newfoundland is quiet. This strategy is intended to change all that, and restore Carbonear Island to its proper place in history.

A market overview of tourism trends was conducted and these trends were related to the Carbonear market. The overview considered information from the Newfoundland and Labrador Department of Tourism, Culture and Recreation, selective outputs of the Travel Activities and Motivation Survey (TAMS) and other secondary sources. This research concluded that the primary market for the strategy is culture and heritage, learning, soft adventure, motorcoach and recreation vehicles. Overall, these markets are growing.

Today, Carbonear is a community on a touring route called the Baccalieu Trail. This route follows the coastline of the Bay de Verde peninsula. There are many tourist attractions along the Baccalieu Trail but there is no specific "anchor" attraction. The report concludes that Carbonear Island could function as an anchor project.

The analysis concluded that the overall strategy should be aligned with the Provincial Tourism Strategy (2002 Tourism Marketing Strategy Review) which is based upon Ontario and the Maritimes being the primary market, the North East U.S. being the secondary market and the purpose of trip markets being sightseeing/touring and adventure/nature viewing.

Opportunities to grow the tourism-focused retail base in Downtown Carbonear were also identified. Based upon current economic impact models of the tourism sector in Newfoundland and Labrador, it is assumed that every \$1 million increase in tourism spending in the Carbonear area will result in 20 to 30 direct and indirect jobs, \$300,000 to \$350,000 in direct and indirect payroll and \$125,000 to \$150,000 in sales taxes (HST) and municipal taxes.

In summary, the report confirms the tourism potential of Carbonear Island as an anchor attraction for tourism along the Baccalieu Trail, and details a realistic and achievable Development Strategy for Carbonear Island and the surrounding Carbonear area that builds upon local interests and opinions, critical investments, current strengths and untapped opportunities. The strategy will be achieved by a consensus-based approach that includes an educational component and implementation action plans that are based upon demand and supply analysis, and the resulting insights. Lastly, the report provides the Town of Carbonear, M-RON and Partners with the knowledge transfer, skills sets and "product development tools" to move forward with confidence in the implementation of both public and private sector action plans.

Recommendations to implement the Carbonear Island Development Strategy are presented as detailed Action Plans. These Action Plans, as presented in Section V of this report, are summarized as follows:

1. Develop the downtown area as a quality tourism destination and place of interest and vitality for the community-at-large with specific emphasis on:
 - On-street and off-street parking.
 - Sidewalk upgrades.
 - Rest areas and “vest pocket” parks
 - Waterfront development
2. Expand the retail base in Downtown Carbonear to make it more attractive to visitors.
3. Construct on-site facilities and infrastructure on Carbonear Island including:
 - A docking facility
 - Removable information panels
 - A stairway from the dock to the top of the Island
 - Walking trails, with information panels situated at key sites or points of interest
4. Highlight the tourism image for Carbonear and Carbonear Island by:
 - Utilizing standardized and colourful signage
 - Adopting and promoting a new Logo
 - Standardizing directional and informational signage
 - Uniform commercial signage
 - Amending the Municipal Planning and Development Regulations to ensure the continued development of the “historical theme” for downtown Carbonear
5. Initiate a destination-marketing plan to generate positive economic impacts for the Town of Carbonear and area including:
 - Engaging an Implementation Coordinator whose major responsibility would be to develop and implement a marketing strategy that targets specific customers or customer groups
 - Developing a public relations program to increase local awareness
 - Designing a high quality and interactive Web Site that should function as a central resource in the Carbonear area

6. The Town of Carbonear, in association with M-RON, the BTTA and the Department of Tourism, Culture and Recreation, establish and oversee a management and organization team to
 - Implement the overall Development Strategy
 - Secure funding
 - Exercise regulatory control

7. Develop a multi-year Financial Plan along with a Proposed Implementation Schedule.

I Introduction

1.1 Purpose of the Strategy

The purpose of the Carbonear Island Development Strategy is to provide strategic direction and a rational process for M-RON and Partners in the planning and implementation of public and private sector Action Plans. The overall goal is to support the further development of Carbonear Island, Downtown Carbonear and surrounding area as a sustainable tourism destination area along the Baccalieu Trail. In the context of the goal, the related objectives are a comprehensive tourism development strategy that focuses on:

- Generating increased tourism visitation and the resulting increase in expenditures.
- Increasing the length-of-stay of tourists.
- Enhancing the seasonal attractiveness and viability of the sector.
- Creating local jobs.
- Generating incremental economic activity by tourism-related development.
- Stimulating and directing sustainable investment in the local tourism sector of the economy.
- Providing international quality products and services, that adhere to Provincial and Federal requirements, in a strategic and sustainable response to market demand.
- Preserving the cultural and natural resources of the local setting.

To meet the study objectives for the Carbonear Island Development Strategy and supporting Action Plans, a five-phase approach was adopted. The step-by-step phases are:

Phase One - Consultation
Phase Two - Market Analysis
Phase Three - Product Situational Analysis
Phase Four - Key Opportunity Identification
Phase Five - Implementation Strategy

These phases are a balanced approach to the identification/assessment of opportunities and implementation requirements. It also ensures that the strategy, implementation Action Plans and organization structure are aligned with senior government directives and tourist values and needs.

The report is presented in five sections. Section I, Introduction, describes the setting and outlines the report format. Section II, Consultation Program, summarizes the findings of discussions with many interests into a vision, strategic objectives and recommended action plan themes. Section III, Market Analysis, starts with an overall view of global tourism trends and then takes these trends down to the local area. Section IV, Product Assessment, contains an inventory of Carbonear, a summary of archival research on Carbonear Island, case studies and the product - market match for the strategy. Section

V, Implementation Strategy, contains recommended Action Plans for upgrades in Downtown Carbonear, infrastructure and services on Carbonear Island, image and identity (including signage), marketing and management/organization. A Financial Plan and a statement of economic impacts and benefits are also included. The Appendices contain related background material.

1.2 The Setting

Carbonear Island is located at the entrance to Carbonear Harbour in Conception Bay on Newfoundland's east coast. It has been referred to as the Gibraltar of the North and, more specifically, as the Gibraltar of Newfoundland. As early as 1614, in the days of piracy, the settlers in that part of Conception Bay used the natural defences of Carbonear Island when pirates like Peter Easton attacked them. Later, it was the only location in Newfoundland to successfully defend itself against the French invasion of 1697 led by Pierre Le Moyne d'Iberville. Again, in 1705, French troops, with their French Canadian *coureur de bois* and Abnaki Indian allies, failed to capture the island when they mounted expeditions from their headquarters in Placentia to drive the English out of Newfoundland.

By the late seventeenth century, just as the English monarchs were recognizing the value of Newfoundland as a prolific source of food to feed its poor and as an excellent training ground for the sailors who were so badly needed in the Royal Navy, France, England's old enemy, was aggressively laying its claim to North America. It was inevitable that the almost continuous state of war that existed between these two European powers would spill over into their colonies in North America.

Frontenac, the governor of New France had completed his plans, by late 1696, to drive the English out of New England. The strategic location of Newfoundland, another English colony, relative to these New England colonies gave Frontenac some concern. He feared that Newfoundland would be used as a base by the English to reinforce the New England colonies. His plans, therefore, called for the destruction of all English settlements in Newfoundland prior to the launch of the New England campaign. To accomplish this, he sent Pierre Le Moyne d'Iberville, an ambitious young soldier/sailor who had distinguished himself militarily, to assist the French governor in Newfoundland with his plan to destroy all English settlements there and kill or drive out the settlers. d'Iberville left Placentia with 120 troops mostly French Canadian irregulars and Abnaki Indians, and marched across country to the east coast of the Avalon Peninsula. At the same time, he sent his two warships along the coast to Fort William (St. John's). After capturing Fort William, he continued on, by sea and land, along the shores of Conception Bay where he captured and destroyed all communities along his route. After capturing Carbonear he sent a messenger to the people on Carbonear Island demanding their surrender, they refused. Several landings were attempted but failed because the Island was too strongly defended. d'Iberville proceeded along the North shore of Conception Bay to Bay de Verde which he burnt and from there to Trinity Bay where he captured and destroyed communities at Old Perlican, Winterton and Hearts Content. He then returned to Carbonear where he was again unsuccessful in his efforts to capture Carbonear Island. He left there to return to Placentia in the spring of 1697 without ever capturing the Island. So, for that period of time in 1697, the only part of the East Coast of Newfoundland that remained firmly under English control was the small Island at the entrance to Carbonear harbour.

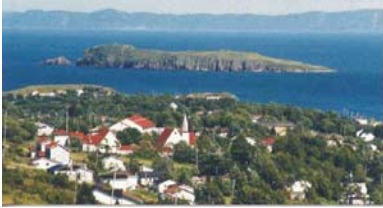
The whole scenario was repeated in 1705. On that occasion, the French failed to destroy St. John's but they did destroy all settlements in Conception and Trinity Bays again with the exception of Carbonear Island. For many years after that, Carbonear Island was maintained as an armed garrison where people from the surrounding communities could defend themselves in the event of attack. In the eighteenth and nineteenth centuries during the days of sail, the Island was a fishing station and home to a small number of settlers. A lighthouse, with a keeper to tend the kerosene light, was erected there in the nineteenth century; the kerosene light and the lighthouse keeper was replaced with an automatic light around 1928.

Today, Carbonear Island is deserted. In 1954, the Historic Sites and Monuments Board of Canada designated the Island as an "event" of national historic significance. As a result of this designation, a plaque was erected in the community of Carbonear in 1981. Except for the occasional local summertime visitor, the Island that represented the last hope for English settlers in Newfoundland is quiet. An objective of this strategy is to change all that, and, over time, restore Carbonear Island to its proper place in History.

This report will outline the strategies and action plans that will enable Carbonear and the area to develop Carbonear Island as the "anchor" attraction for tourism along the Baccalieu Trail.

II Consultation Program

2.1 Introduction



The purpose of this section is to summarize the opinions of stakeholders and sectoral representatives. These findings are then consolidated to prepare a vision (preferred future), strategic objectives and action plan themes for the strategy.

The consultation process was approached by applying several techniques. It started with a local media program with the M-RON Advisory Committee acting as the local contact. The process included newspaper advertisements, local radio promotion spots, local (Carbonear Island) cable television coverage, website development, a toll-free telephone number and distribution of community flyers. The media program was designed to gain public input from the following communities:



Carbonear Area
Carbonear
Freshwater
Victoria
Salmon Cove

Harbour Grace Area
Bristol's Hope
Harbour Grace
Harbour Grace South
Riverhead.



Carbonear and Harbour Grace were the locations of the public meetings. Special interest group consultations were also carried out. These sessions included discussions with representatives of the Rebel Island Theatre Group, the Carbonear Harbour Authority, the Harbour Grace Harbour Authority, the Carbonear Fishers' Committee, the Baccalieu Heritage Corporation, the Carbonear Heritage Society and the Baccalieu Trail Tourism Association (BTTA). Finally, individual discussions were conducted with selected individuals and community leaders.

The consultations were completed from November 2003 to February 2004. All discussions allowed the respondents to identify topics for discussion and to explore these topics to an acceptable level of detail.



From the consultation findings, the consultants prepared a draft vision statement and "long list" of potential actions for the strategy. These outputs were reviewed with the Carbonear Island Advisory Committee: comments were received from the committee and revisions were made. The result of these activities is the vision, strategic objectives and action plan themes (see Section 2.3) that frame the overall strategy. The themes represent the gaps between the current setting and the vision.

2.2 Community Input



In November 2003, two facilitators conducted public meetings, one in Carbonear and one in Harbour Grace. A set agenda was followed for both meetings and the role of the facilitators was to manage the meetings, ask probing questions and clarify the topics discussed or opinions presented.

2.2.1 Gap Analysis

Based on the consultation program, many suggestions were provided to the consultants on gaps between the current setting and the preferred future. The identified gaps are summarized below:

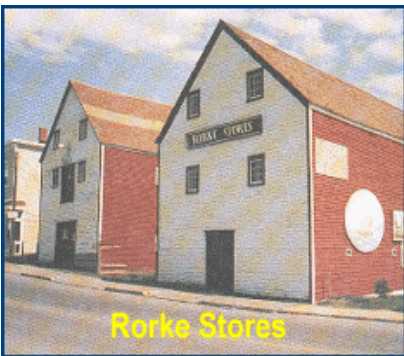
- Leadership in tourism planning and development
- Accommodations to serve various market segments
- Marketing to specific segments
- Infrastructure to support tourism developments
- Community links to supporting organizations
- Regulations to protect heritage and natural resources
- Research to better understand tourism demographics
- More effective use of the Internet
- Transportation to Carbonear Island.



2.2.2 Interviews

Key interests (individual stakeholders and groups) were interviewed to better understand the current state of tourism in the Carbonear area and how the strategy can proactively result in positive benefits and spin-offs.

A “soft” or informal agenda was used for the interviews with open and frank discussions often the result. To permit this important input to the strategy, confidentiality is respected.



The interviews provided valuable insight into the concerns, expectations and opinions of key stakeholder and interest groups towards the current state of tourism and what should be addressed in the strategy.

Participants in the interviews offered many opinions on possible projects or supporting services that may strengthen or diversify the local tourism sector. There was a clustering of responses (strong agreement) that the Carbonear area is lacking a tourist anchor project, there is a need for this anchor project and Carbonear Island can perform this role. There was also overwhelming support for the anchor project to include on-the-island interpretation and sensitive, historically correct restoration/development. While some respondents stated the lack of



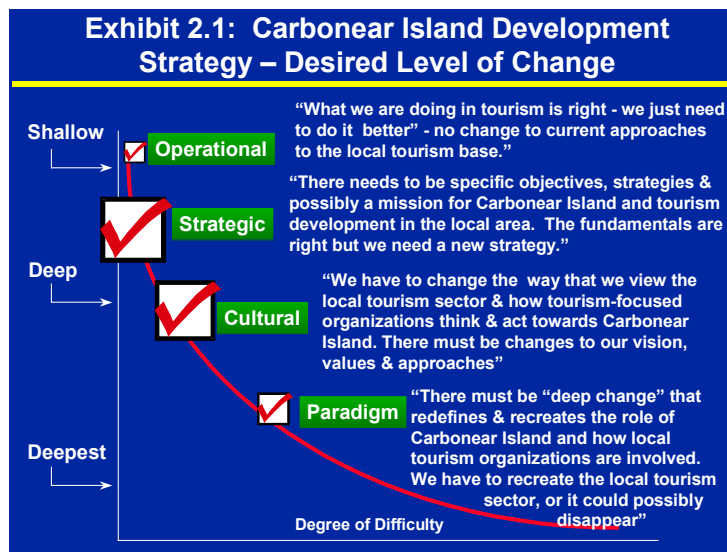
confirmed financing (pre-project planning stage) can impede future actions, there is a consensus that the strategy should be broad enough to include effective marketing and business support services. Financial support to “grow the tourism sector” and capacity building (staff and management skill upgrading) were cited as key requirements for successful implementation of the strategy. While it was acknowledged that many local organizations are playing a role in the tourism sector, it was stated that the anchor project role of the Carbonear Island Development Strategy would provide clarity to these various roles with more effective engagement.

The interviews included discussions on the role of the private sector. Some respondents stated that visitors are more sophisticated and local tourism-focused businesses should better understand service or product quality. Value (price plus quality) was also identified as another challenge for the local sector as some accommodation, food and retail operators charge too much (inferior quality) or too little (exceptional value). The result is the relationship between quality and price is not clear. This condition is not unique to the local setting but is evident in research by the consultants throughout Atlantic Canada.

2.2.3 Key Stakeholders Self-Assessment Survey

The purpose of the self-assessment survey is to gain an understanding of the collective thinking of key stakeholders and the Carbonear Island Advisory Committee towards the strategy. The results of the self-assessment survey are a poll and not a statistically reliable survey with confidence levels.

This survey provides valuable insights into the expectations and preferred future for projects under the strategy. These insights are summarized in the remainder of this subsection. They also form a context for the recommendations.



A question was included in the self-assessment survey to determine the expectations of respondents towards the future of tourism in the Carbonear area. Four comments were posed and respondents were asked to select the statement that best reflects their opinion on the current state and future strategic requirements for Carbonear Island’s integration with the local tourism base. A total of 26 responses were received to this question. As the following exhibit reveals, each of the comments reflects a different

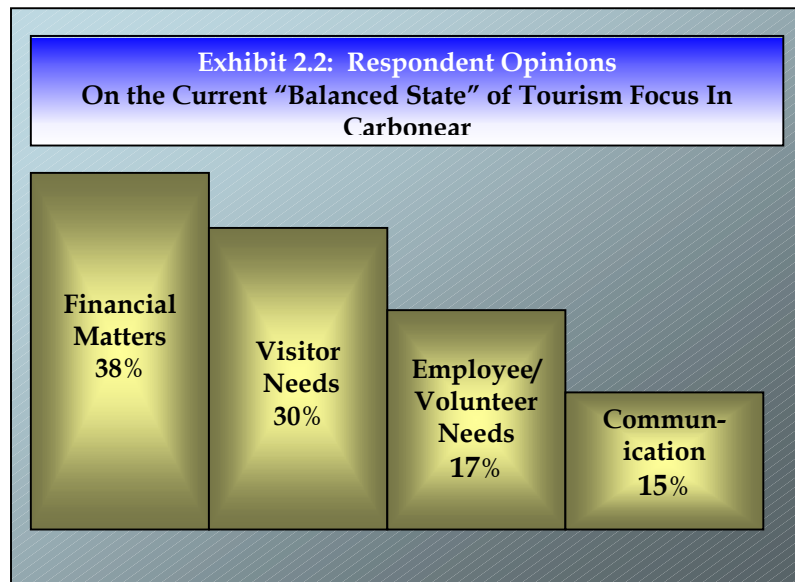
level of change. The easiest level of change is operational. The comments relating to operational change were selected by eight percent of the respondents. The next level of

change, in terms of difficulty, is strategic. The comments relating to strategic change were selected by 46 percent of the respondents. The next level of change is more difficult and relates to cultural change, or change in attitudes and beliefs towards tourism development and the expected benefits. Many organizations or individuals talk about the need for cultural change but often talk does not translate into real actions and the resulting positive outputs or outcomes. This condition exists because of the “culture and history” of organizations and the established workplace lifestyles of individuals. In other words, we are mostly creatures of habits that find change to be very difficult. Even with the increased difficulty of cultural change, 35 per cent of respondents selected this level of change for the strategy. The most difficult level of change is a paradigm shift. For example, the airline industry faced a paradigm shift after the September 11, 2001 terrorist attacks. Many airlines were not able to adjust as they ceased to operate while other operators have profitably grown under market and security conditions since September 2001. The paradigm shift or very deep change approach to the strategy was selected by 11 percent of respondents.

Based upon the findings of the strategic change question, there is a consensus (81 percent of respondents) that the strategy should focus on strategic and cultural change issues and opportunities.

Many tourism-focused organizations have achieved success by maintaining a balance between financial resources and happy employees (including volunteers), satisfied customers (tourists) and appropriate internal communications. For example, you cannot have unhappy employees in a motel or community information centre providing exceptional service to

tourists. A question was included in the self-assessment survey to determine the current (2004) balanced state of these four important factors. The results of 22 respondents are presented in the following exhibit. Ideally, each factor should have 25% of the responses. This balanced state is not present as the current focus is on addressing financial matters and



meeting the needs of tourists. The result is a lack of focus on internal communications, and meeting the needs of employees, directors and volunteers.

Respondents were asked to identify “must see” attractions in Newfoundland, along the Baccalieu Trail and in the Carbonear area. The results of the top three “must see” attractions in the Town of Carbonear, along the Baccalieu Trail, and in the Province of Newfoundland and Labrador are listed in Exhibit 2.3.

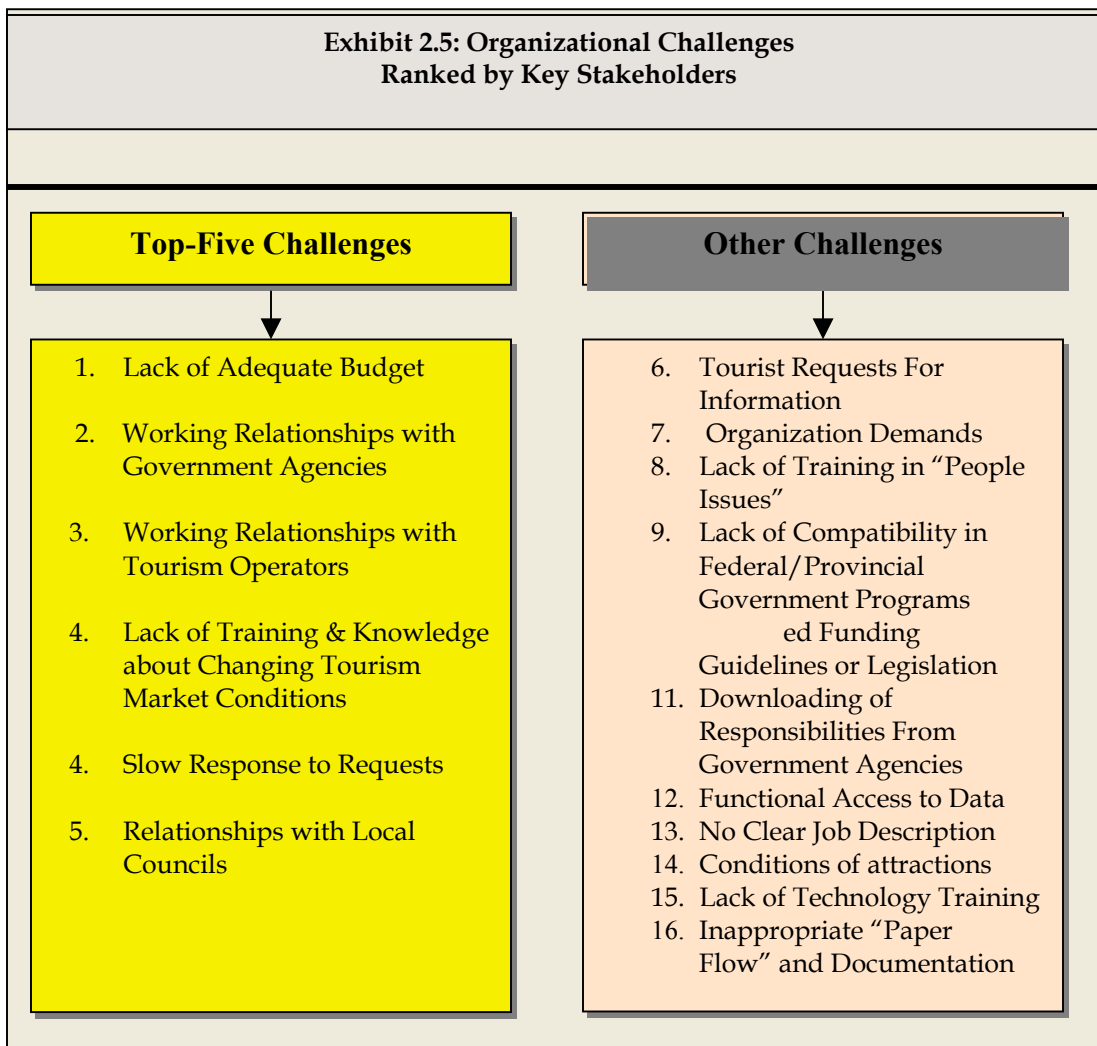
Exhibit 2.3: Priority Attractions			
Priority	CARBONEAR	BACCALIEU TRAIL	PROVINCE
1	Harbour Rock Hill	Carbonear Island, Museums, Baccalieu Island	Gros Morne National Park
2	Carbonear Museum and Downtown	Festivals (e.g. Brigus Blueberry, Klondyke)	Lanse aux Meadows, Signal Hill
3	Carbonear Island	Cable Station - Hearts Content	Trinity

To gain insights on potential priorities for the strategy, respondents were probed to identify priorities by allocating \$100 to tourism-related planning, programming, marketing or management over the next five years. Twenty-seven respondents answered this question. The results are listed in the next exhibit. They reveal that the priorities are infrastructure (mainland and Carbonear Island), staff training, media programming, and government funding and partnerships.

Exhibit 2.4: Expenditure Priorities	
Values \$	Carbonear Tourism Investment Priorities
\$16	Infrastructure - In Carbonear
\$14	Infrastructure - At Carbonear Island
\$10	Government - Funding and Partnering Programs
\$10	Training - Full Time Staff
\$10	Advertising (Print, TV and Radio)
\$7	Programming & Interpretation - On Carbonear Island
\$7	Festivals and Events - In Carbonear
\$6	Accommodation - In Carbonear
\$6	Internet-Based Marketing
\$6	Training Part-time Staff
\$3	Outdoor Facilities - In Carbonear
\$5	Other: Boat tours to Carbonear Island, step on guides and professional staff, lottery to raise money, archaeology digs.

Strategy implementation will require the support of local organizations and volunteers. To gain an understanding of the current organization challenges, respondents were asked to rank the top five challenges that they experienced over the last year (or since being hired or becoming an active member if less than a year). Those respondents not active in an organization were asked to answer from their viewpoint.

The results are presented in Exhibit 2.5. The top challenges are a lack of adequate budget and training, relationship with government agencies, tourism operators and local councils. The top five and other ranked challenges are also listed.



2.2.4 Community and Sector Groups

In addition to the interviews and key stakeholders self-assessment survey, community and sector group sessions were conducted. The two-hour sessions was organized to allow open and creative discussions by those attending. The sessions started with a presentation on the strategy's objectives and a review of the work-to-date. The agenda then shifted to a SWOT analysis where facilitators assisted the participants define the strengths, weaknesses, opportunities and threats (SWOT) of their community or the sector's tourism position in 2003. Following the completion of this task, the next agenda item was a discussion of a vision for the community's tourism sector in 2008. The last agenda item was a discussion of the gaps between the current state and the vision. In these discussions, the facilitators assisted participants to identify requirements (after the sessions, refined by the consultants into action plan themes) to arrive at the desired vision for the community in 2008. The results are summarized in Exhibits 2.6 (Carbonear) and 2.7 (Harbour Grace).

In summary, the consultation program provided inputs and insights to guide the strategy. Many of the participants in the consultation program are new to the process of tourism anchor project planning and development, and the linking of this type of project to the local community and local business sector. The findings can be summarized as follows:

1. There is support for more tourism development in the Carbonear area.
2. There is interest by communities and tourism-related or tourism-focused organizations to be active in the strategy.
3. There is consensus that Carbonear Island should become an anchor tourism project for the Carbonear area.
4. The strategy should allow for the coordination of other tourist destinations on the Baccalieu Trail.
5. The strategy should contain information, and possibly action plans, that help local businesses with tourism products and services.
6. The strategy should focus on infrastructure upgrading, enforcement of sustainable resource management practices, and the preservation of historical and cultural assets of the area; especially Carbonear Island.
7. The strategy's implementation should be monitored to respond to shifting tourism markets and senior government priorities.
8. The strategy needs to focus on community-based tourism product development that maximizes the benefits within the Town of Carbonear and surrounding area.

Exhibit 2.6: Carbonear Consultations

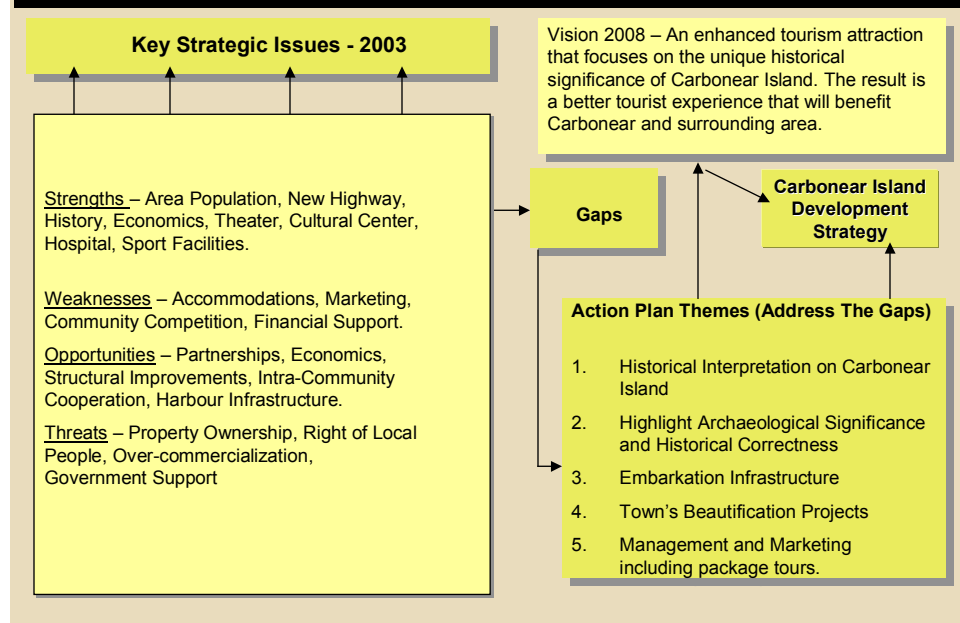
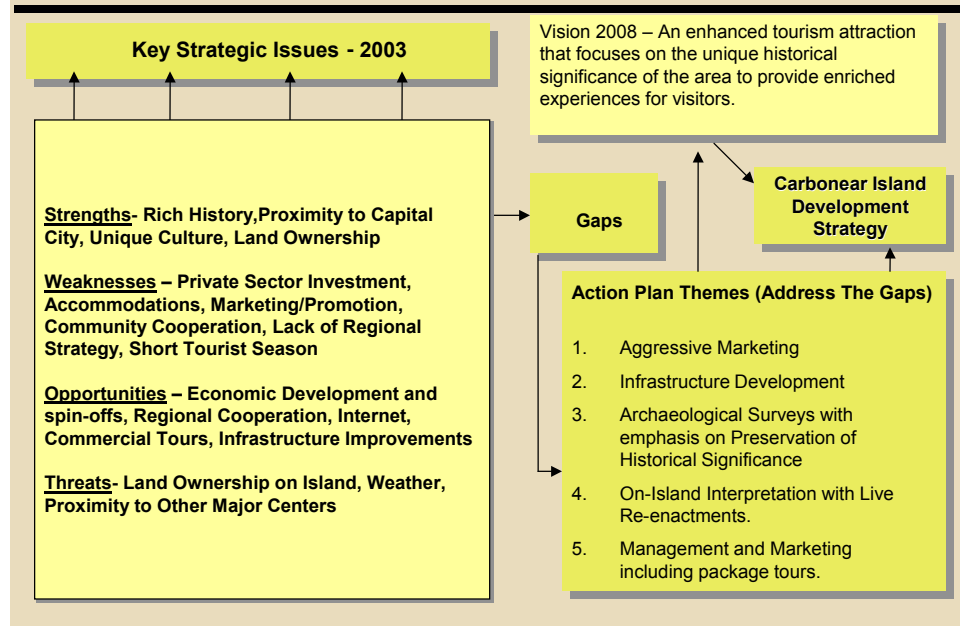


Exhibit 2.7: Harbour Grace Consultations



2.3 Vision, Strategic Objectives and Action Plan Themes

Based upon the findings of the consultations and meetings with the Carbonear Island Advisory Committee, a vision was prepared to guide the strategy.

Exhibit 2.8: Vision For The Strategy

In the future, we see Carbonear Island as an anchor project for the Baccalieu Trail that preserves the Island's cultural and natural assets, and provides sustainable positive economic benefits for the Carbonear area.

The move towards the vision, the continued growth of tourism in the Carbonear area must respect the local historic context and natural setting. To ensure appropriate initiatives under the strategy, five strategic objectives for future tourism development in the Carbonear area are recommended:

1. Tourism in the Carbonear area has a low impact on the local heritage and cultural resources, and the natural environment. The result is tourism activity is sustainable over time without altering or negatively affecting the experience for future generations.
2. The year 2002 was the UN International Year of Ecotourism and the Quebec Declaration on Ecotourism contains recommendations that should be viewed as signposts for the implementation of the strategy. A copy of the Quebec Declaration on Ecotourism is included in the Appendices.
3. Tourism provides direct benefit to the local economy and local inhabitants, thereby providing an incentive for local support and preservation of natural and cultural / heritage resources.
4. Travel along the Baccalieu Trail to the Carbonear area should provide an educational component so visitors can learn about the natural and cultural history of the local area.
5. Tourism-related decisions should be made based on accurate information and knowledge.

The vision and strategic objectives were used to prepare action plan themes that were tested against the market to arrive at the recommendations in Section V - Implementation Strategy. The themes are:

- *Physical Improvements* to upgrade the attractiveness (and hence positive economic impacts) of the Carbonear area to visitors, and to permit marine access to Carbonear Island in a cost-effective and managed manner.
- *Visitor Amenities on Carbonear Island* to ensure that the experience is value-added and sustainable from an environmental and cultural perspective.
- *Communicating with Visitors* by high impact marketing approaches to understand the desires and expectations of different market segments.
- *A Supporting Management and Organization Structure* to facilitate implementation.

2.4 Land Ownership

During the public consultation phase, property ownership was identified as a potential concern for any proposed tourism development. This was probably a concern because of poor records that infer ownership. After reviewing archival records, the consultants are reasonably satisfied that this matter will not pose a threat to the implementation of the proposed Carbonear Island Development Strategy.

The preferred embarkation site would be adjacent to the Rorke Store. The Town has confirmed that it has a 10-foot easement between the Rorke Store and Strickland Agencies building that would provide direct access to a floating or fixed dock in that area.

The consultants recommend that the Town should begin immediately to negotiate the rights to, or ownership of, the right-of-way for the proposed harbour side boardwalk extension.

The land ownership issue for Carbonear Island was discussed with officials in the Provincial Archaeology Office and the Department of Tourism, Culture and Recreation. All of these officials were of the understanding that the Island was Crown Land. A search of the Registry of Deeds did not reveal any land registrations on the Island. Therefore, the consultants are of the opinion that land ownership on the Island will not be a negative factor in implementing action plans that involve docking infrastructure and interpretive tours. Provincial regulations are in place to regulate archaeological site assessment or digs.

III Market Analysis

3.1 Introduction

This section presents a market overview of major tourism trends and then relates these trends to the Carbonear market. Many sources were used; including reports of the Department of Tourism, Culture and Recreation, and selective outputs of the Travel Activities and Motivation Survey (TAMS). An association of Canadian tourism ministries and organizations collaborated in 1999 to conduct TAMS as two large and comprehensive surveys to assess the travel activities and motivators of pleasure travel among Canadians and Americans. TAMS was conducted between September 1999 and April 2000. The telephone survey portion of TAMS was completed by 28,397 individuals in the United States and by 18,385 individuals in Canada.

Secondary information sources were also used, based on pre or post September 11, 2001 data. Since the September 2001 terrorist attacks, tourism markets worldwide have experienced declining demand with the resulting negative impacts on many suppliers and operators. By 2003, established expenditure conditions had returned to many markets. Because many datasets on conditions in 2003 were not available when this report was published, the consultants selected to also use some data from earlier years as representative of typical market conditions.

3.2 The Current Situation

3.2.1 Global Overview

Tourism 2020 Vision is the World Tourism Organization's (WTO) long-term forecast and assessment of the development of tourism up to the first 20 years of the new millennium. A key component of the Tourism 2020 Vision is inbound tourism forecasts by region, with 1995 as the base year and forecasts for 2000, 2010 and 2020.

While tourism conditions have been irregular since September 2001, WTO maintains its long-term forecast since 2001. The underlying structural trends of the forecast are believed not to have significantly changed since 2001. Experience shows that in the short-term, periods of faster tourism growth (1995, 1996, 2000) alternate with periods of slow growth (2001 and 2002). While the pace of growth till 2000 actually exceeded the Tourism 2020 Vision forecast, it is generally expected that the current slowdown will be compensated in the mid- term to long-term.

Based on these assumptions, WTO's Tourism 2020 Vision forecasts that international arrivals are expected to reach over 1.56 billion by the year 2020. Of these worldwide arrivals in 2020, 1.2 billion will be intraregional (example - Boston to St. John's) and 0.4 billion will be long-haul travellers (example - London, England to St. John's).

The total tourist arrivals by region shows that by 2020 the top three receiving regions will be Europe (717 million tourists), East Asia and the Pacific (397 million) and Americas (282 million), followed by Africa, the Middle East and South Asia.

East Asia and the Pacific, South Asia, the Middle East and Africa are forecasted to record growth at rates of five percent per year, compared to the world average of 4.1 percent. The more mature regions (Europe and Americas) are forecast to show lower than average growth rates. Europe is assumed to maintain the highest share of world arrivals, although there will be a decline from 60 percent in 1995 to 46 percent by 2020. These data show that Newfoundland and Labrador will be operating within a global tourism market (Americas) that should experience 3.9 percent average annual growth to 2020 with a stable market share.

Exhibit 3.1						
WTO Tourism 2020 Vision: Forecast of Inbound Tourism, World by Regions						
International Tourist Arrivals by Tourist Receiving Region (million)						
	<i>Base Year</i>	<i>Forecasts</i>		<i>Average Annual Growth Rate (%)</i>	<i>Market Share</i>	
	1995	2010	2020	1995 – 2020	1995	2020
World	565.4	1,006.4	1,561.1	4.1	100	100
Africa	20.2	47.0	77.3	5.5	3.6	5.0
Americas	108.9	190.4	282.3	3.9	19.3	18.1
East Asia and the Pacific	81.4	195.2	397.2	6.5	14.4	25.4
Europe	338.4	527.3	717.0	3.0	59.8	45.9
Middle East	12.4	35.9	68.5	7.1	2.2	4.4
South Asia	4.2	10.6	18.8	6.2	0.7	1.2
Intraregional (a)	464.1	790.9	1,183.3	3.8	82.1	75.8
Long-Haul (b)	101.3	215.5	377.9	5.4	17.9	24.2

Source: World Tourism Organization Website, June 2004 (based on WTO database from July 2000)

There are broad trends that interact to produce the WTO forecasts. While all factors impacting on the forecasts will only emerge in the future, some of these trends are established and hence relevant to the Carbonear area. The following is a point form listing of trends that should impact on the Carbonear area and provide a context for the strategy:

- The demographic trend to lower female fertility (less children) and mortality rates (longer life) means visitors to the Carbonear area will generally be older and healthier. They will be more demanding because of past travel experiences as they have more disposable income. They will be seeking new destinations with unique cultural experiences. As a result, specialized and personalized service, such as step on guides for Carbonear Island, will be demanded.
- Areas like Carbonear, and the Baccalieu Trail will be viewed by a segment of the overall aging market as “off the beaten track.” A feature article on Newfoundland in June 2004 in the New York Times (Sunday travel section) is representative. With this trend, the strategy must acknowledge the increased number of elderly tourists – particularly women.
- The aging baby boom population segment will continue to shape the tourism sector. In a comparative context, boomers are more active than previous generation and more interested in experimental and learning vacations. Many boomers are highly educated sophisticated tourists that demand experiences that combine education, entertainment and uniqueness.

- Other markets are also changing with the broad trend to small families. The “families-with-children” market is slowing in growth due to the general aging of the population while the over-75 age group is increasing.
- Cultural tourism will be a growing segment. It is defined as travel directed toward experiencing the arts, heritage and special character of a place. Tourists in this segment are seeking unique and diverse experiences that are authentic. The WTO reports that 37 percent of all international trips include a cultural component and this market has been growing at the rate of 15 percent a year. The market is expected to increase with aging populations of highly educated, well-travelled baby boomers. This segment will be important to the Carbonear area.
- Another segment that will be important to the Carbonear area is heritage tourism. It focuses on the authentic features and stories that make a destination unique. Market sectors such as tours (motorcoach and educational) and independent travellers (families, seniors and international visitors) seek cultural experiences. These experiences are also increasingly popular for some business travellers.
- Programming and supporting infrastructure for the strategy should embrace the trend that visitors want travel experiences that is educational as well as entertaining and relaxing. The result is a shift away from passive experiences towards those that offer participatory opportunities (for example – accessing Carbonear Island as opposed to viewing from the mainland). This trend is acknowledged in the strategy, as participation in “adventure travel” grew at 15 percent to 20 percent per year in the late 1990s primarily in soft, safe adventure vacations that combine adventure by day and comfort by night without the hardships of traditional wilderness adventure travel.
- A desire to experience places like Carbonear Island reflects a trend that tourists increasingly are looking for vacations that bring them closer to the environment. The result is greater interest in studying, protecting and experiencing natural resources through interactive study tours. Some tourism developers and operators have embraced this trend and the Quebec Declaration on Ecotourism, which contains private sector recommendations.
- The Internet is becoming increasingly important as a marketing avenue for small operators in particular. In parallel with this trend is the emergence of e-hosts like Expedia.ca who can provide all-inclusive travel arrangements. TAMS research in 1999/2000 revealed that 53 percent of all tourists (who took a trip in the last two years) used the Internet for research while 18 percent booked trips using the Internet. For the youth market, the respective numbers are 70 percent and 26 percent.
- With e-tourism and an overall aging population, another trend is more demand for low impact tourism in which travellers can contribute to natural and cultural heritage conservation through their travel choices and activities. This low impact preference has been embraced by some tour operations that now include the cost of carbon credits (airplane pollution) in their prices to support sustainable tourism. In this context, cultural globalization creates an immediate opportunity

to “brand” Carbonear Island. As the case studies in Section IV reveal, one of the effects has been a strengthening of regional and national cultures and identities. Another effect has been many tourists want to escape the global “style” of tourism and find destinations that are unique, authentic and unspoiled. The Carbonear area can meet this need.

In summary, the emergence of tourism as a global industry has diminished the opportunity for visitors to experience unspoiled locations with traditional lifestyles that are available in the Carbonear area and the Baccalieu Trail. It is worth noting that there is an emerging trend called anti-tourism where anti-tourists believe that the possibilities of experiencing something authentic and typical are dependent on few tourists present in the area. This type of tourist seeks an emphatic experience of place, interested in the local cultures and the regional way of life.

3.2.2 Canadian Overview

The target market for Newfoundland and Labrador (and the Carbonear area) will be influenced by global trends. However, Canada is functioning within a competitive marketplace. This section provides a Canadian context to the strategy. Data from the Canadian Tourism Commission (CTC) shows Canadian residents (83 percent) dominate the market. The remainder is dominated by the United States (14 percent and then the United Kingdom (less than one percent).

Exhibit 3.2	
Visitation to Canada	
Volume of Tourists to Canada - 2002	
	Trips
Canadian Residents	95,215,000
U.S. Residents	16,168,000
Overseas Residents	<u>3,796,000</u>
Total	115,179,000
<i>Source: Canadian Tourism Commission</i>	

Exhibit 3.3		
Top 10 Countries of Origin for Overnight Visitors to Canada - 2002		
Country of Origin	Overnight Trips	
	Trips	Nights Spent
USA	16,168,000	64,507,000
United Kingdom	721,000	9,371,000
Japan	423,000	4,884,000
France	312,000	4,144,000
Germany	292,000	4,319,000
Mexico	161,000	2,187,000
Australia	149,000	2,051,000
South Korea	143,000	3,486,000
Hong Kong	118,000	2,015,000
Netherlands	107,000	1,578,000
<i>Source: Statistics Canada</i>		

Americans took a total of 16.2 million trips to Canada in 2002 or 14 percent of all trips. The following is a breakdown of the top 15 states by visitation to Canada.

Exhibit 3.4 Top 15 U.S. States for Overnight Visitors to Canada - 2002		
State of Origin	Overnight Trips	
	Trips	Nights Spent
New York	2,084,000	6,799,000
Michigan	1,927,000	5,323,000
Washington	1,706,000	5,897,000
California	947,000	5,047,000
Ohio	890,000	2,967,000
Massachusetts	727,000	2,781,000
Pennsylvania	713,000	3,012,000
Illinois	580,000	2,714,000
Minnesota	493,000	2,107,000
New Jersey	462,000	1,900,000
Florida	432,000	2,725,000
Texas	403,000	2,027,000
Maine	324,000	1,173,000
Wisconsin	319,000	1,511,000
Connecticut	307,000	1,378,000
<i>Source: Statistics Canada</i>		

The above exhibit supports the findings of TAMS (see Section 3.1 for overview) that the U.S. markets with the highest incidence of travel to Canada are primarily situated along the Canadian border. TAMS states that proximity dictates the prime markets for each province. In this context, the New England states represent the greatest opportunity (non-Canadian) for the Province Newfoundland and Labrador and the Baccalieu Trail. The somewhat distant location of the Atlantic Canada to major U.S. population areas has impacted upon visitation levels. Seven percent of U.S. visitors to Canada travel to Atlantic Canada. Similarly, international air routes favour other regions as 4.2 percent of international travels came to Atlantic Canada.

Exhibit 3.5 Travel to Canada by Province Visited - 2002		
Province/Region	US Residents	Overseas Residents
	<i>'000s overnight visits</i>	
	17,786	5,418
Atlantic Region	1,237	228
Quebec	2,555	997
Ontario	8,140	1,751
Manitoba/Saskatchewan	578	138
Alberta	1,076	795
British Columbia	3,904	1,441
<i>Source: Canadian Tourism Commission</i>		

The top activities of international visitors are listed in the next exhibit. There are some differences between U.S. residents and overseas visitors.

Exhibit 3.6		
Top Activities Participated in by International Tourists to Canada - 2002		
	US Residents	Overseas Residents
	%	%
Shopping	63	87
Sightseeing	53	76
Participation in sports/ outdoor activities	32	31
Visiting friends or relatives	30	57
Visit an historical site	30	40
Visit a national or provincial nature park	24	49
Go to a bar or night club	22	31
Visit a museum or art gallery	21	38
Attending cultural events	12	14
Visit a zoo, aquarium, botanical garden	11	26
<i>More than one activity may be participated in while on trip</i>		
<i>Source: Canadian Tourism Commission</i>		

The heritage tourism segment will be an important market for the strategy. Over one-half of this segment visits historic sites.

Exhibit 3.7	
Most Popular Heritage Tourism Activities in Canada	
Activities	
General history museums	86%
Farmer's fairs or markets	67%
Local festivals or fairs	65%
Science & tech museums	58%
Historic sites	55%
Historical replicas of cities/towns	54%
Pick your own farms / harvesting	39%
French Canadian cultural experiences	31%
<i>Source: Research Resolutions & Consulting Ltd. Canada's Heritage Tourism Enthusiasts, A Special Analysis of the Travel Activities and Motivation Survey (TAMS)</i>	

Analysis by Research Resolutions states "there will be an increase in the absolute number of Canadians who will be in the market for heritage activities between 2000 and 2026, from an estimated 2.6 million to about 3.7 million in 2026. Canada's likely share of this market - those who will seek heritage experiences and take leisure trips within Canada - is also expected to grow from 2.2 million to 3.0 million." This trend is important for the Carbonear area as it supports a growing market for the strategy.

Exhibit 3.8			
Place of Residence of Canadian Heritage Tourism Enthusiasts			
	Canadian Adults	Recent Leisure Travellers In Canada	
	Total	Total	Heritage Enthusiasts
<i>Adults 18+</i>	<i>23.3 million</i>	<i>14.0 million</i>	<i>2.2 million</i>
Atlantic Canada	8%	8%	8%
Quebec	25%	24%	17%
Montreal CMA	12%	11%	10%
Ontario	38%	35%	42%
Toronto CMA	16%	12%	17%
Manitoba/Saskatchewan	7%	8%	6%
Alberta	9%	11%	13%
British Columbia	13%	15%	14%
Vancouver CMA	7%	7%	7%

Source: Research Resolutions & Consulting Ltd. Canada's Heritage Tourism Enthusiasts, A Special Analysis of the Travel Activities and Motivation Survey (TAMS)

The distribution of heritage tourism enthusiasts is presented in the next exhibit. It shows 616,000 heritage enthusiast trips to Atlantic Canada (28 percent of 2.2 million) or 24 percent of all trips to the region.

Exhibit 3.9			
Canadian Heritage Tourism Enthusiasts Destinations Visited in Past Two Years			
	Canadian Adults	Recent Leisure Travellers in Canada	
	Total	Total	Heritage Enthusiasts
<i>Adults 18+</i>	<i>23.3 million</i>	<i>14.0 million</i>	<i>2.2 million</i>
Canadian Destinations	60%	100%	100%
Atlantic Canada	11%	18%	28%
Quebec	21%	36%	44%
Ontario	29%	48%	54%
Manitoba/Saskatchewan	9%	15%	17%
Alberta	14%	24%	30%
British Columbia	18%	30%	36%
Territories	1%	1%	2%

Source: Research Resolutions & Consulting Ltd. Canada's Heritage Tourism Enthusiasts, A Special Analysis of the Travel Activities and Motivation Survey (TAMS)

With Atlantic Canada attracting 28 percent of Canadian heritage enthusiasts compared to 18 percent of the overall tourism market, the CTC's strategy for cultural heritage tourism states,

*"The most likely people to be traveling to cultural sites are seen as retirees and aging baby-boomers who have the time, money and increasing interest in the past and in how other people live. Within this broad profile of travellers motivated by the desire to be exposed to and understand different cultural experiences are distinct sub-segments, which cannot be ignored. These include 'learning travellers' who may have a very focused agenda."*¹

The Ontario Ministry of Tourism and Recreation commissioned a special analysis and review of TAMS using 25 years into the future population projections from Statistics Canada and the United States Census Bureau.² The future analysis projected current behaviour patterns into the future assuming that all factors except age, gender, education, place of birth and immigration flows remain the same. While the outputs are specific to Ontario tourists, they provide general signposts that answer two questions that are relevant to Carbonear:

What types of tourism activity are likely to grow?

Which are likely to shrink as the population ages?

The aging TAMS data confirm that the strategy should focus on the heritage/cultural market. This segment will increase significantly over the next 25 years as the population in all age cohorts (groups) between 18 and 54 years declines and the 55 plus market grows significantly. With an overall aging population, youth and family-orientated segments will experience decline. Demand will also decrease for strenuous outdoor experiences and traditional outdoor activities like fishing, canoeing, hunting and camping. While heritage/cultural attractions may benefit from the aging of tourists, operators will need to review their facilities and programs to ensure amenities and facilities meet the requirements of an older and ethnically diverse population. This population will increasingly include local residents to ensure the viability of museums, galleries, theatres and other performing venues.

With an aging population, an increasing percentage of the total population will be living from pensions and other sources. This shift from earned income will result in a substantial increase in tourists on fixed or low income.

The following exhibits show the impact of the population structure in 2026 on adult population, family oriented and older adult tourism oriented products. It is important to note less interest in outdoor activities by immigrants than those born in Canada. Also, interest in different types of tourism activities varies by place of birth outside of Canada (Eastern Europe, Asia and Central/South America).

¹ Canadian Tourism Commission. Packaging the Potential: A Five-Year Business Strategy for Cultural and Heritage Tourism in Canada, December 1999, P 7.

² The results are summarized in the report, Impacts of Aging the Canadian Market on Tourism in Ontario, A Special Analysis of the Travel Activities and Motivation Survey (TAMS), Ontario Ministry of Tourism and Recreation, July 2002.

Exhibit 3.10	
Impact of 2026 Population Structure on Growth Rates	
	Impact of 2026 Population Structure on Growth Rate
Activity Groups	
Soft Outdoor Adventure	-65%
Hard Outdoor Adventure	-38%
Fishing	-63%
Golfing	-17%
Spectator Sports	8%
Art Galleries/Museums	25%
Cultural Performances	40%
Aboriginal Cultural Activities	0%
Horticulture	72%
Wine/Culinary	42%
Zoos/Aquariums	-14%
Casino Gambling	-7%
Shopping	16%
Individual Activities	
Family/Child-Oriented Products	
Children's Museums	-71%
Zoos	-23%
Aquariums	-16%
Movie Theme Parks	-20%
Mega Amusement Parks	-21%
Rock 'n Roll/Popular Concerts	-52%
Adult/Older Adult-Orientated Products	
Art Galleries	42%
General History Museums	17%
Science & Tech Museums	-7%
Opera	86%
Live Theatre	30%
Ballet/Dance	74%
Classical Concerts	72%
Historic Sites	11%
Botanical Gardens	42%
Casinos	-2%
Wineries	25%
Touring	
Day Bus Tours - City	54%
Day Bus Tours - Countryside	70%
Overnight Guided Scenic Tours - Countryside	16%
<i>Source: Adapted from Special TAMS Canada Tabulations, Tables 15, 16, and 17.</i>	

Exhibit 3.11					
Anticipated Differences in Tourism Activities by Place of Birth - 2026					
Outdoor Activities on Trips	Born in Canada	Born Outside Canada			
	Total	Total	Eastern Europe	Asia	Central/South America
Cycling	16%	9%	4%	6%	12%
Kayaking/Canoeing	15%	8%	6%	4%	13%
White Water Rafting	3%	1%	*	*	*
Fishing (Fresh water)	19%	12%	16%	7%	18%
Hunting	4%	1%	1%	*	*
Wilderness hiking/Backpacking	18%	8%	7%	4%	5%
Golfing	22%	13%	5%	3%	8%
Snowmobiling	4%	2%	2%	*	*
Any Winter Sports	20%	11%	5%	7%	5%
Cultural & Indoor Activities on Trips					
Art Galleries	21%	23%	23%	17%	25%
General History Museums	26%	21%	25%	15%	22%
Science & Tech Museums	19%	17%	15%	13%	13%
Live Theatre	26%	22%	23%	11%	30%
Classical Concerts	8%	12%	17%	7%	2%
Historic Sites	14%	14%	15%	9%	7%
Botanical Gardens	14%	20%	18%	14%	7%
Casinos	26%	13%	11%	14%	18%
*Less than 0.5%.					
<i>Source: Adapted from Special TAMS Canada Tabulations, Table 16 and 17.</i>					

3.2.3 Newfoundland and Labrador Context

The Department of Tourism, Culture and Recreation is responsible for tourism – related policies and programs within Newfoundland and Labrador. This department has ongoing initiatives to review the tourism market. A major initiative was the Province of Newfoundland and Labrador Product Market Match Study. This study states that there is a trend towards an increasing role for culture and heritage in generating travel. Research indicates that, with limited exceptions, Newfoundland and Labrador’s culture and heritage tourism product does not have the kind of world class appeal necessary to support a special interest or niche market development effort based on this product as the central theme. However, this report states that the major role for cultural and heritage products in Newfoundland and Labrador will be to support the appeal and marketing of general touring holidays in the Province, and to support the appeal and marketing of other types of special interest products.

This setting is similar to most North American destinations, where the cultural and heritage product is part of the general appeal of the destination, but not unique or ancient enough to allow the destination to compete against world class culture and heritage destinations. In other words, while culture and heritage products may not have sufficient appeal to be demand generating tourism products on their own, they can play an effective role as contributing demand generators, complementing the full range of other demand generating products, including both touring holidays and special interest products – giving tourists an added reason to select Newfoundland and Labrador as a destination.

In this context, the overall strategy for Newfoundland and Labrador is first to strengthen the culture and heritage product in the Province and to market it as a contributing, added reason to visit the Province for a touring trip, and also as an added appeal to buying another type of special interest product in the province. In the context of Zone 17 (North West Avalon), which contains the Baccalieu Trail and Carbonear, the Carbonear Island Development Strategy is aligned with this aspect of Product Market Match Study.

The Product Market Match Study summarizes the following long-term strategy:

Stage 1: Strengthen the culture and heritage tourism product and promote it as part of the general appeal of the destination (Province) to touring and other markets.

Stage 2: Develop festivals and special events based on culture and heritage experiences and promote them nationally and internationally.

Stage 3: Begin promoting the culture and heritage products and special events in international tourism markets to build awareness and to support the marketing of selected world class niche products to niche markets.”³

In 2002, the Department of Tourism Culture and Recreation released the Newfoundland and Labrador Tourism Marketing Strategy Review. This review identified the following

³ Newfoundland and Labrador Product Market Match Study Volume IV: A Strategy for Cultural and Heritage Tourism, prepared by The Economic Planning Group of Canada, 1996, p 15

markets as offering the best potential for tourism activity in Newfoundland and Labrador:⁴

Geographic Markets

Primary

- Ontario
- Maritimes

Secondary

- North East U.S.

Purpose of Trip Markets

- Sightseeing/Touring
- Adventure/Nature Viewing
- Hunting/Fishing
- Meetings, Conventions and Incentive Travel.

The exhibits below provide an overview of the volume of non-resident visitors to Newfoundland and Labrador for the past 10 years. Total visitation to the Province has consistently increased each year and overall by 30 percent from 1996 to 2003. In 2003, total visitation was 427,701 or \$732 per visitor.

Exhibit 3.12					
Annual Non-Resident Visitation and Expenditures					
Newfoundland and Labrador: 1994-2003					
Year	Auto		Air		Total
	Visitors	Expenditures	Visitors	Expenditures	Visitors
1994	114,629	\$46.2	214,800	\$119.0	329,429
1995	118,133	\$48.5	204,364	\$119.9	322,497
1996	109,626	\$46.3	195,436	\$118.2	305,062
1997	122,425	\$56.2	247,265	\$175.5	369,690
1998	127,960	\$60.3	244,253	\$177.8	372,213
1999	140,864	\$68.0	256,600	\$195.4	397,464
2000	149,975	\$75.3	266,480	\$212.1	416,455
2001	141,675	\$72.2	266,276	\$215.1	407,951
2002	161,442	\$85.2	259,467	\$216.0	420,909
2003	140,401	\$74.1(E)	287,300	\$239.1(E)	427,701

*Source: Department of Tourism, Culture and Recreation
(E) - Estimated*

⁴ Newfoundland and Labrador Tourism Marketing Strategy Review, prepared by Economic Planning Group of Canada, November 2002, P ii.

Exhibit 3.13 Peak Season (June to September) Non-Resident Visitation and Expenditures Newfoundland and Labrador: 1993-2003					
Year	Auto		Air		Total
	Visitors	Expenditures	Visitors	Expenditures	Visitors
1994	83,440	\$34.4	83,753	\$46.8	167,193
1995	85,870	\$36.4	82,028	\$48.1	167,898
1996	79,460	\$34.5	75,081	\$45.3	154,541
1997	92,972	\$42.8	102,388	\$72.6	195,360
1998	93,118	\$43.8	94,552	\$68.7	187,670
1999	102,722	\$50.8	100,641	\$76.9	203,363
2000	110,425	\$57.2	104,839	\$83.9	215,264
2001	103,583	\$54.2	104,856	\$85.0	218,439
2002	118,179	\$64.0	108,114	\$90.5	226,293
2003	103,300	\$54.5(E)	129,200	\$107.6(E)	232,500

*Source: Department of Tourism, Culture and Recreation
(E) – Estimated*

The Maritimes and Ontario are the largest non-resident markets. In 2002, the Maritime Provinces accounted for 26 percent of non-resident visitation, (auto and air) and Ontario accounting for 38 percent. Within the Province, there are 22 tourism economic zones. Carbonear is located in Zone 17 – North West Avalon. Based upon the 1997 exit survey, the local region accounts for over 9.0 percent of all visits but lags in room-nights. This condition is a result of proximity to St. John’s (day trips) and tourists passing through the region to overnight elsewhere. This condition is reflected in accommodation occupancy over the 1999 to 2003 period. It is important to note that average occupancy has increased from 15.7 percent in 1999 to 29.9 percent by 2003.

Exhibit 3.14 Non-Resident Visitors Newfoundland and Labrador By Origin: January to December						
Origin	Auto			Air		
	2003	2002	2001	2003	2002	2001
Nova Scotia	43,042	49,115	46,710	N/A	29,320	30,089
P.E.I.	2,774	3,153	2,960		1,816	1,864
New Brunswick	13,205	15,983	13,776		8,303	8,521
Total Maritimes	59,021	68,251	63,446		39,439	40,474
Quebec	8,354	8,794	6,823		12,973	13,314
Ontario	44,582	50,562	42,097		107,419	110,238
Western Canada	9,603	11,083	8,721		45,926	47,131
New England	4758	5,860	5,254		5,449	5,592
Mid Atlantic	3364	4,171	3,656		6,227	6,391
East North Central	2151	2,838	2,672		4,670	4,793
South Atlantic	3837	4,499	4,126		5,708	5,858
Other USA	4679	5,319	4,878		11,676	11,982
Total USA	18,789	22,687	20,586		33,730	34,616
International	58	141	102		19,719	20,237
Total	140,401	161,442	141,675		259,467	266,276

Source: Department of Tourism, Culture and Recreation

Exhibit 3.15 Zone 17 - 5 Year Average Accommodation Occupancy Data (1999 - 2003)													
Total Rooms Available	2340	2165	2381	2335	2889	3358	3527	3349	3139	2674	2366	2405	32928
Total Rooms Sold	223	218	281	355	439	1033	1715	1752	1057	433	328	204	8038
Occupancy Rate	9%	10%	12%	15%	15%	31%	48%	51%	33%	16%	13%	8%	24%

Source: Department of Tourism, Culture and Recreation

Exhibit 3.16
Profile of Economic Zones Visited by Non-Resident Air Visitors
1997 Air Exit Survey

Economic Zone	Description of Area	% of Party Visits	% of Party Nights	Average Stay
Zone 1	Rigolet to Nain	1.1	0.8	7.1
Zone 2	Labrador West/Churchill Falls	2.2	1.5	6.3
Zone 3	Happy Valley/Goose Bay, North West River	2.2	1.4	5.7
Zone 4	Mary's Harbour to Cartwright	0.1	0.1	5.0
Zone 5	Labrador Straits (L'Anse Au Clair to Red Bay)	1.2	0.3	2.1
Zone 6	Viking Trail, St. Anthony South West to Plum Point, East to Roddickton/Englee	4.1	1.5	3.3
Zone 7	Gros Morne Area, Viking Trail North to and including Plum Point	8.5	2.7	2.9
Zone 8	Deer Lake/Humber Area/Corner Brook	4.0	2.0	4.6
	Corner Brook	9.4	3.5	3.4
Zone 9	Stephenville/Port Au Port/Burgeo	3.9	3.4	8.0
Zone 10	Port Aux Basques/Doyles/Rose Blanche	1.5	1.0	6.2
Zone 11	Baie Verte/La Scie/Green Bay	2.7	1.5	5.2
Zone 12	Grand Falls-Windsor Area	8.6	4.2	4.5
Zone 13	Bay D'Espoir Area	0.8	0.5	5.9
Zone 14	Gander/Twillingate East to Terra Nova Area	18.2	8.1	4.1
Zone 15	Clarenville/Bonavista Peninsula Area	14.6	6.6	4.1
Zone 16	Burin Peninsula	4.9	3.8	7.1
Zone 17	North West Avalon	9.4	7.2	7.0
Zone 18	Argentia/Placentia Area	4.3	2.5	5.4
Zone 19	North East Avalon/St. John's (excluding St. John's)	6.0	5.4	8.2
	St. John's	70.0	40.7	5.3
Zone 20	Southern Shore Area	4.3	1.0	2.0

Source: Department of Tourism, Culture and Recreation

Exhibit 3.17
Profile of Economic Zones Visited by Non-Resident Auto Visitors
1997 Auto Exit Survey

Economic Zone	Description of Area	% of Party Visits	% of Party Nights	Average Stay
Zone 1	Rigolet to Nain	0.3	0.1	2.0
Zone 2	Labrador West/Churchill Falls	0.6	0.1	2.1
Zone 3	Happy Valley/Goose Bay, North West River	0.6	0.2	2.8
Zone 4	Mary's Harbour to Cartwright	0.1	0.03	3.0
Zone 5	Labrador Straits (L'Anse Au Clair to Red Bay)	2.3	0.4	1.7
	Labrador			
Zone 6	Viking Trail, St. Anthony South West to Plum Point, East to Roddickton/Englee	15.4	3.6	2.4
Zone 7	Gros Morne Area, Viking Trail North to and including Plum Point	39.1	11.1	2.9
Zone 8	Deer Lake/Humber Area/Corner Brook	13.4	3.9	2.9
	Corner Brook	24.1	6.9	2.9
Zone 9	Stephenville/Port Au Port/Burgeo	16.4	6.7	4.2
Zone 10	Port Aux Basques/Doyles/Rose Blanche	29.7	5.6	1.9
Zone 11	Baie Verte/La Scie/Green Bay	7.6	3.2	4.2
Zone 12	Grand Falls-Windsor Area	16.8	7.0	4.2
Zone 13	Bay D'Espoir Area	1.8	1.1	6.3
Zone 14	Gander/Twillingate East to Terra Nova Area	36.9	11.7	3.2
Zone 15	Clarenville/Bonavista Peninsula Area	20.3	6.5	3.2
Zone 16	Burin Peninsula	5.5	3.2	5.8
Zone 17	North West Avalon	9.1	5.2	5.8
Zone 18	Argentia/Placentia Area	6.1	1.2	1.9
Zone 19	North East Avalon/St. John's (excluding St. John's)	3.4	2.4	7.2
	St. John's	47.4	18.6	4.0
Zone 20	Southern Shore Area	3.5	1.0	2.8

Source: Department of Tourism, Culture and Recreation

North West Avalon attracted 9.1 percent of all non-resident auto party visits during 1997 and accounted for 5.2% of the in-province nights. St. John's attracted 47.4 percent of all non-resident auto party visits and accounted for 18.6 percent of the in-province nights. The other tourism areas around St. John's are Zone 18 (Placentia area) and Zone 19 (North East Avalon).

Exhibit 3.18					
Characteristics of Auto Visitors - 1997					
<i>(From the 1997 Provincial Auto Exit Survey)</i>					
% Party Visits & Party Nights & Average Stay					
	Zone 17 (NW Avalon)	Zone 18 (Placentia Area)	Zone 19 NE Avalon)	St. John's	Zone 20 (Southern Shore)
% of parties reporting Zone as a major destination	9.1	6.1	3.4	47.4	3.5
% of Province nights attributed to the Zone	5.2	1.2	2.4	18.6	1.0
Average stay (nights)	5.8	1.9	7.2	4.0	2.8
<i>Source: Department of Tourism, Culture and Recreation</i>					

For the non-resident auto visitors reporting Zone 17 as one of their major destinations, 3.4 percent were in the province for business reasons, 51.2 percent were vacationing and 41.6 percent were visiting friends and relatives.

Exhibit 3.19						
Purpose of Trip %						
	Province	Zone 17 (NW Avalon)	Zone 18 (Placentia Area)	Zone 19 NE Avalon)	St. John's	Zone 20 (Southern Shore)
Business	3.6	3.4	2.5	2.3	5.4	3.4
Vacation/Pleasure	60.8	51.2	79.3	41.2	68.0	74.9
VFR	31.3	41.6	14.6	49.7	21.9	17.9
Other	4.3	3.8	3.5	6.8	4.7	3.9
<i>Source: Department of Tourism, Culture and Recreation</i>						

Twenty-five percent of the visitors reporting the North West Avalon as one of their major destinations were from the Maritime Provinces, 45 percent from Ontario and 15 percent from the United States. This profile is different than provincial averages with more visitors from Ontario.

Exhibit 3.20 Origin of Trip %						
	Province	Zone 17 (NW Avalon)	Zone 18 (Placentia Area)	Zone 19 (NE Avalon)	St. John's	Zone 20 (Southern Shore)
Maritimes	30.5	25.3	15.0	36.2	23.9	19.5
Ontario	34.7	44.6	34.7	40.7	38.2	37.4
Quebec	3.7	3.8	4.1	2.3	4.1	2.8
Western Canada	8.0	9.0	9.9	7.9	11.5	6.7
United States	19.8	15.2	30.6	12.9	19.5	30.2
Foreign	2.9	2.1	5.7	1.7	2.8	3.4

Source: Department of Tourism, Culture and Recreation

Six percent of those visiting Zone 17 traveled alone, 45 percent as husband and wife and 20 percent as couples with children. The average party size reported was 2.54 persons. This profile reflects the broad trends presented in Section 3.2.1.

Exhibit 3.21 Group Composition %						
	Province	Zone 17 (NW Avalon)	Zone 18 (Placentia Area)	Zone 19 (NE Avalon)	St. John's	Zone 20 (Southern Shore)
Alone	6.9	6.2	5.5	5.1	6.8	6.2
Husband & Wife	41.4	45.0	52.6	45.8	45.7	55.9
Couple & Kids	20.6	19.5	14.2	23.2	19.0	13.6
Other Family	13.0	11.4	7.4	13.0	9.6	10.2
Average Party Size	2.67	2.54	2.52	2.76	2.58	2.42

Source: Department of Tourism, Culture and Recreation

In the range of 72 percent of non-resident auto visitors reporting Zone 17 as one of their major destinations were over the age of 40, which compares closely to 68 percent for the province as a whole.

Exhibit 3.22 Age of Respondents %						
	Province	Zone 17 (NW Avalon)	Zone 18 (Placentia Area)	Zone 19 (NE Avalon)	St. John's	Zone 20 (Southern Shore)
17 & under	1.3	0.9	0.4	8.1	1.2	1.2
18 - 24 years	2.9	2.3	3.9	4.3	2.0	1.9
25 - 29 years	7.6	6.8	2.1	6.7	6.0	5.6
30 - 34 years	9.3	8.2	6.0	10.4	7.0	6.2
35 - 39 years	10.6	9.8	7.4	12.3	9.4	9.9
40 - 44 years	12.0	10.3	9.9	13.5	12.4	11.8
45 - 54 years	22.8	22.8	27.2	14.1	23.1	19.9
55 - 64 years	19.1	24.2	24.7	19.6	22.9	26.1
65 - 74 years	12.8	13.3	18.0	15.3	14.5	15.5
75 & over	1.5	1.4	0.4	1.8	1.5	1.9

Source: Department of Tourism, Culture and Recreation

Visitors have a high level of education attainment in comparison to the overall population. Almost 34 percent have graduated from university.

Exhibit 3.23 Education Level %						
	Province	Zone 17 (NW Avalon)	Zone 18 (Placentia Area)	Zone 19 (NE Avalon)	St. John's	Zone 20 (Southern Shore)
Some High School	6.8	9.3	4.6	9.4	5.1	4.0
High School Grad	15.6	17.2	11.6	16.5	13.1	11.5
Some Community College	8.1	9.9	10.6	18.2	7.8	6.9
Community College Graduate	16.9	17.2	9.9	15.9	15.5	11.5
Some University	9.7	11.2	10.3	11.8	10.0	16.7
University Grad	41.3	33.9	52.3	27.0	47.3	48.8

Source: Department of Tourism, Culture and Recreation

Just over 42 percent of visitors to Zone 17 reported household incomes greater than \$60,000, compared to 48% for the province as a whole.

Exhibit 3.24 Household Income Level %						
	Province	Zone 17 (NW Avalon)	Zone 18 (Placentia Area)	Zone 19 (NE Avalon)	St. John's	Zone 20 (Southern Shore)
Under \$10,000	1.0	0.9	1.1	2.6	0.8	0.0
\$10,000-\$19,999	2.6	2.1	2.2	3.2	2.0	2.3
\$20,000-\$29,999	7.0	8.5	6.1	3.8	6.4	5.2
\$30,000-\$39,999	13.0	16.0	9.7	17.3	11.6	12.8
\$40,000-\$49,999	14.2	15.7	12.9	19.2	13.1	11.6
\$50,000-\$59,999	14.5	14.8	15.8	18.6	13.7	19.8
\$60,000-\$69,999	11.2	12.9	15.1	11.5	11.6	12.8
\$70,000-\$79,999	10.3	9.2	7.2	10.3	10.6	12.8
\$80,000-\$89,999	7.0	5.4	6.8	3.8	7.5	7.0
\$90,000-\$99,999	4.6	4.5	5.7	0.6	5.1	5.2
\$100,000 & Over	14.6	10.1	17.6	9.0	17.7	10.5

Source: Department of Tourism, Culture and Recreation

St. John's is the major urban centre in Newfoundland and Labrador. It also represents the major market for non-resident visitors to the Carbonear area (day trips).

There are over 300,000 non-resident visitors to the City of St. John's each year. The City of St. John's has attracted more than 70 percent of all non-resident travellers to the Province since 1997. Non-resident auto visitors to the City reached a record 103,956 between January and December 2002. Non-resident air visitors to the City reached 204,586 in the same period. Total visitation to the City increased by 15 percent or 41,000 visitors in the last five years.

Exhibit 3.25 Annual Non-Resident Visitation to the City of St. John's: 1996 - 2002						
Year	Auto		Air		Total	% of Total Visitation to NF
1996	57,334	29%	139,456	71%	196,790	65%
1997	78,842	29%	189,158	71%	268,000	72%
1998	82,406	31%	185,052	69%	267,458	72%
1999	90,716	32%	191,515	68%	282,231	71%
2000	96,512	32%	201,733	68%	298,245	72%
2001	91,239	30%	208,608	70%	299,847	74%
2002	103,956	34%	204,586	66%	308,542	73%

Source: Department of Tourism Statistics

The exhibit below identifies the monthly volume of non-resident travel to the City of St. John's from 1999 to 2002. The majority of non-resident auto visitations to the City occur between July and September. In this period (2002 estimate), the City attracted approximately 68,403 visitors or 66 percent of all auto travellers to the City during the year.

Exhibit 3.26 Non-Resident Visitation to the City of St. John's by Month: 1999-2002								
	1999		2000		2001 (E)		2002 (E)	
January	3,610	4%	4,500	5%	3,923	4.3%	4,470	4.3%
February	1,753	2%	1,371	1%	1,460	1.6%	1,663	1.6%
March	2,622	3%	2,781	3%	2,098	2.3%	2,391	2.3%
April	2,562	3%	2,604	3%	2,463	2.7%	2,807	2.7%
May	3,378	4%	3,748	4%	3,558	3.9%	4,054	3.9%
June	6,682	7%	7,336	8%	7,117	7.8%	8,109	7.8%
July	22,474	25%	23,280	24%	21,897	23.9%	24,949	23.9%
August	26,042	29%	29,026	30%	27,463	30.1%	31,291	30.1%
September	10,954	12%	11,415	12%	10,675	11.7%	12,163	11.7%
October	5,643	6%	5,498	6%	5,748	6.3%	6,549	6.3%
November	2,482	3%	2,436	3%	2,463	2.7%	2,807	2.7%
December	2,512	3%	2,510	3%	2,372	2.6%	2,703	2.6%
Total	90,714		96,505		91,237		103,956	

*Source: Department of Tourism, Culture & Recreation
(E) - Estimated, based on provincial visitation*

In 2002, the majority of visitors indicated the purpose of their trip was either for vacation or pleasure (39 percent), business (29 percent) or to visit friends or family (28 percent).

Exhibit 3.27					
Non-Resident Purpose of Visit to the City of St. John's - 2002					
Purpose of Visit	Auto		Air		Total Estimated No. of Visitors
	Estimated No. of Visitors	% of Total Visitors	Estimated No. of Visitors	% of Total Visitors	
Business	5,614	5.4%	84,289	41.2%	89,903
Vacation/Pleasure	70,690	68.0%	49,510	24.2%	120,200
Visit Friends/Family	22,766	21.9%	64,649	31.6%	87,415
Other	4,886	4.7%	6,138	3%	11,024
	103,956		204,586		308,542
<i>Source: City of St. John's, Tourism</i>					

The following exhibit identifies the activities visitors participated in while visiting St. John's, as extrapolated from the 1997 Auto and Air Exit Surveys.

Exhibit 3.28				
Activities of Non-Resident Auto and Air Visitors To the City of St. John's: 1997 Exit Surveys				
Activity	Auto		Air	
<i>Total Visitors to St. John's</i>		103,956		204,586
Scenic Touring	92.1%	95,743	78.5%	160,600
Viewing Sea Coast/Ocean	97.0%	100,837	86.3%	176,558
Whale Watching	66.8%	69,443	41.8%	85,517
Iceberg Viewing	56.2%	58,423	38.2%	78,152
Taking Boat tours	57.0%	59,255	39.8%	81,425
Explore Wilderness Areas	52.7%	54,785	33.9%	69,355
Nature Viewing	69.0%	71,730	49.7%	101,679
Bird Watching	50.2%	52,186	30.6%	62,603
Hiking	50.3%	52,290	34.4%	70,378
Sea Kayaking	2.5%	2,599	0.4%	818
Canoeing	3.5%	3,638	0.6%	1,228
Sport Fishing	10.0%	10,396	4.1%	8,388
Hunting	0%	0	0.1%	205
Golfing	9.1%	9,460	6.5%	13,298
Visit Historic Sites/Museums	89.1%	92,625	74.0%	151,394
Visit Archaeological Sites	41.9%	43,558	25.9%	52,988
Visit Friends	53.3%	55,409	47.4%	96,974
Visit Relatives	42.1%	43,765	31.7%	64,854
Attend Festivals/Events	54.3%	56,448	44.4%	90,836
<i>Source: Extrapolated from Department of Tourism, Culture & Recreation Statistics</i>				

The following is a demographic profile of the visitors to St. John's based on 2002 auto (103,956) visitation and air (204,586) visitation extrapolated using percentages obtained from the 1997 Auto and Air Exit Survey.

Exhibit 3.29			
Estimated Demographic Profile of Non-Resident			
Auto & Air Visitors the City of St. John's: 2002			
<i>Based on 1997 Auto & Air Exit Surveys Percentages</i>			
	Total	Auto	Air
Party Composition:			
Husband & Wife	92,819	47,196	45,623
Alone	113,149	7,173	105,976
Couple & Children	28,246	20,063	8,183
Other	74,328	29,524	44,804
	308,542	103,956	204,586
Origin of Party:			
Ontario	120,720	39,295	81,425
Quebec	16,946	4,262	12,684
Maritimes	62,291	25,261	37,030
Western Canada	44,484	11,955	32,529
United States	44,925	20,375	24,550
Other	19,176	2,808	16,368
	308,542	103,956	204,586
Age Categories:			
24 and Under	11,205	3,430	7,775
25-34	57,298	13,722	43,576
35-44	73,810	22,663	51,147
45-54	79,464	24,430	55,034
55-64	52,752	23,702	29,050
65-74	27,648	14,554	13,094
75+	6,365	1,455	4,910
	308,542	103,956	204,586
Income Categories:			
Under \$20,000	12,426	3,015	9,411
\$20,000 - \$39,999	37,832	18,192	19,640
\$40,000 - \$59,999	65,604	27,756	37,848
\$60,000 - \$79,999	66,555	23,182	43,373
\$80,000 - \$99,999	48,082	13,098	34,984
\$100,000 +	78,043	18,713	59,330
	308,542	103,956	204,586
<i>Source: Extrapolated from Department of Tourism, Culture & Recreation Statistics</i>			

The Department of Tourism, Culture and Recreation collects data on visitation to historic sites. These data do not segment between residents and non-residents. Between mid June and mid October 2003, 61,411 travellers and 461 groups visited provincial historic sites. This volume of travellers/visitors represent a decrease of six percent over the same period 2002, compared to an increase of 45 percent from 2001.

Exhibit 3.30 Provincial Historic Sites Visitation				
Provincial Historic Site	Location	2003	2002	2001
Cape Bonavista Lighthouse	Bonavista	12,349	12,702	5,700
Mockbeggar Plantation	Bonavista	3,198	3,806	2,365
Ryan Shop Mercantile Building	Bonavista	6,033	7,198	4,718
Hiscock House	Trinity	4,996	5,418	3,660
Trinity Interpretation Centre	Trinity	6,459	6,746	5,106
Beothuck Interpretation Centre	Boyd's Cove	8,038	8,222	6,959
Point Amour Lighthouse	Point Amour, Labrador	5,904	5,695	3,786
Heart's Content Cable Station	Heart's Content	7,628	7,428	6,699
Commissariat House	St. John's	3,010	5,058	3,723
Quidi Vidi Battery	St. John's	3,796	3,365	2,605
Colony of Avalon	Ferryland	17,310	18,473	18,305
		78,721	84,111	63,626
Source: Department of Tourism, Culture & Recreation				

A system of nine National Historic Sites operates in the province. Visitation to these properties has increased by almost 22 percent from 2001 to 2003.

Exhibit 3.31 National Historic Sites Visitation				
National Historic Sites	Location	2003	2002	2001
Red Bay	Red Bay, Labrador	10,414	9,887	7,961
L'Anse aux Meadows	L'Anse Aux Meadows	33,974	33,416	27,044
Port aux Choix	Port Au Choix	14,057	13,273	11,470
The Ryan Premises	Bonavista	8,457	8,655	6,961
Hawthorne Cottage	Brigus	5,682	5,902	4,531
Castle Hill	Placentia	15,896	15,599	14,868
Cape Spear	St. John's	42,648	28,157	17,769
Signal Hill - Visitor Centre	St. John's	8,320	9,621	10,873
Signal Hill - Cabot Tower	St. John's	33,160	35,132	40,258
		172,608	159,642	141,735
Source: Canadian Heritage				

Two other attractions are the Cape St. Mary's Ecological Reserve and Salmonier Nature Park. From 2001 to 2003, the reserve had visitation increase by 41 percent while no increase was experienced at the Salmonier Nature Park.

Exhibit 3.32 Visitation to Other Attractions			
	2003	2002	2001
Cape St. Mary's Ecological Reserve	22,177	18,103	15,747
Salmonier Nature Park	31,107	31,598	31,046
Source: Department of Tourism, Culture & Recreation			

3.3 Market Insights

With an understating of global conditions and local trends, we now focus on insights for market segments. The following subsections present a summary of the key findings from the market research. The section includes an overview of the heritage and cultural market as well as learning vacations, motor coach and recreation vehicles (RV). Some of the data or information sources are based upon pre September 2001 conditions because these conditions are more representative of longer-term trends for the Carbonear area.

3.3.1 Culture and Heritage Travel

As the TAMS and Provincial data reveal, this market should be the focus of the strategy by adding reasons for a touring trip. One-third of Canadians and Americans (adults) attend one or more cultural activity or event each year. As the provincial tourism strategy notes, cultural and heritage tourism are important in extending a visitor's stay, increasing demand (off-peak and shoulder seasons) and generating repeat business. For business travellers, culture and heritage products can be important elements of packages for convention and business events.

The Canadian Tourism Commission has segmented the Canadian travel market based on general travel motivations. The result is seven segments as listed below:

- Nature Buffs (15 percent)
- Culture Enthusiasts (15 percent)
- Cautious Travellers (12 percent)
- Knowledge and Variety Seekers (9 percent)
- City Seekers (15 percent)
- Organized Travellers (17 percent)
- Sports Activists (17 percent).

Of relevance to the market for culture and heritage tourism in the Carbonear area are Culture Enthusiasts. The segment is 15 percent of Canadian travel or ±2.5 million travellers annually. The total annual expenditure is ±\$3.8 billion.

There is much research to support the strategy's focus on this market segment.

The CTC report "*The American Tourism Market – Evolution of 2010*", concludes outdoor and heritage tourism products are the most compelling attraction for Americans. This competitive advantage lies with the authenticity of Canadian products, as many American products are perceived as being too commercialized. The strategy for Carbonear will retain the integrity of the Town and Carbonear Island.

A 2003 study from the Travel Industry Association of America (TIA) and Smithsonian Magazine shows continued and growing interest in travellers' desire to experience cultural, arts, historic and heritage activities. Study results show that 81 percent of U.S. adults who traveled in 2002, or 118 million, are considered historic/cultural travellers. These travellers included historical or cultural activities on almost 217 million person-trips in 2002, up 13 percent from 192 million in 1996. (A person-trip is one person on one trip traveling 80 kilometres or more from home, one way.) These travellers also spend more money on historic/cultural trips compared to the average U.S. trip (average \$875 versus \$650, excluding cost of transportation), making historic/cultural travellers a lucrative market for destinations and attractions. For 30 percent of historic/cultural travellers, their destination choice was influenced by a specific historic or cultural event or activity.

Compared to the average trip in the U.S., historic/cultural trips are more likely to be seven nights or longer and include air travel, a rental car, and a hotel stay. Historic/cultural travellers are also more likely to extend their stay to experience history and culture at their destination. In fact, four in 10 added extra time to their trip specifically because of a historic/cultural activity.

Genealogical Tourism

An emerging segment of the cultural and heritage tourism market is genealogical tourism. The data on this segment is limited but it could represent an opportunity for the Carbonear area as visitors seek to trace their family roots.

Genealogical-based tourism or GBT is a term used to refer to non-business travel for the purpose of researching family genealogy, including viewing of original documents, viewing/visiting sites such as homesteads, churches, schools and cemeteries, and visiting/meeting with relatives for the purpose of learning about, recording, discussing and celebrating family history.

Genealogy has become almost a sacred mission for tens of thousands of Canadians, and millions of people worldwide. This interest was first sparked by the 1967 Centennial and has been fuelled by the Internet which has given birth to Web sites devoted to this strong desire to reconnect to our roots. According to *MacLean's* (September 1999), the fascination with family trees has made genealogy the second most popular use of the World Wide Web with two million sites and counting. (A Google search of the Internet in June 2004 using "genealogy" generated over 16 million sites).

Interest in genealogical research is being driven by the demands of two different groups - retired and semi-retired boomers and 35 -44 year olds. Both groups are seeking enrichment rather than escapism. For the 35 - 44 group, the nomadic days are over and they are often raising a family and looking for short haul trips. That search is taking them to museums, historic sites, local graveyards and archives. More than half of the visitors to the National Archives of Canada are genealogists, as many build their vacations around the search for their roots. In support of these researchers, the National Archives provide a how-to guide titled *Tracing Your Ancestors in Canada*.

In other parts of the world, this search for roots is well understood and has become a part of the nation's tourism strategy. For example, the Irish Heritage Council in cooperation with the Ministry of Tourism has capitalized on this tourism market with an array of services keyed to genealogy. The Mormons, whose mission is to link the human chain all the way from Adam, have turned their Salt Lake City archive into a centre of family searches. The Scottish Tourist Board has also recognized the value of genealogical tourism.

3.3.2 Learning Vacations

Learning vacations are defined as a pre-organized, structured and high quality learning opportunities to experience the authentic cultural, historical and environment of an area. These vacations can vary in length, purpose, amount of formal and structured learning, as well as support required from the travel industry.

A high profile learning vacations program is Elderhostel. Founded by the University of New Hampshire, this program has expanded to include Interhostel (for adults 50 years and older) and Family hostel (inter-generational travel). As an example, the 2004-2005 Interhostels's "University Leaving Vacations" program contains 50 one-week and two-week tours and cruises to many destinations.

According to research of Canadian programs completed by Elderhostel, there are different types of learning travellers:

- *Explorers* who look for programs that offer an opportunity to actively explore a new part of the world. Participants want to learn about the local area, history, people and customs.
- *Activity-oriented participants* who seek programs that are held outdoors with a focus on the natural environment.
- *Content-committed participants* who seek a specific topic.
- *Convenience-oriented participants* who look for programs close to home – usually within one day’s travel.

Learning travel packages typically serve groups of six to 50, which are expected to remain the core of this market segment in the short to medium-term.

There was an estimated growth of 13% in the learning travel market in Canada. This rate is above the WTO growth in worldwide tourism. Learning vacation companies typically target older adults as they are at a stage in life where they have both time and money. The baby boomers will expand the potential as this age cohort grows. There is also some interest in family learning vacations while the family hostel-type program is cross generational. The family segment typically seeks a short and affordable trip (less than five days) that is close to home and does not conflict with the school year.

Atlantic Canada products are sold by major learning travel providers, including:

- Smithsonian Study Tours
- Berkeley University’s Bear Treks
- Saga Holidays Road Scholar Program
- Canadian Cultural Landscapes
- The Audubon Society
- Royal Ontario Museum.

The rich natural and man-made resources along the Baccalieu Trail and in the Carbonear area require a high priority be placed on this segment. Also, relatively close proximity to the University of New Hampshire (Elderhostel, interhostel, familyhostel) is an asset.

3.3.3 Adventure Travel and Nature-Based Travel

Adventure and nature-based travel takes place in often exotic, remote or wilderness destinations. Soft adventure is travel with mild physical activity to an interesting location with comfortable accommodations. The focus is typically on visual excitement. In contrast, hard adventure refers to activities that require physical exertion.

For this market segment, Carbonear Island and surrounding mainland would be appealing because of the unspoiled setting with a cultural overlay. However, this market must be framed as outlined below:

- The natural setting and respect for the environment are important.

- Multiple activities are required. For the general consumer, hiking is the top activity followed by wildlife viewing and learning about other cultures.
- St. John's type accommodation is not required as smaller scale and less conventional accommodation is normally acceptable.
- Parks and protected areas rate very highly in importance – particularly for European visitors.
- Guides and interpretation should be provided to enhance the quality of the experience.
- Word of mouth is an important source of information for choosing destinations.
- Special interest organizations and niche market magazines are important marketing channels.

The TAMS survey isolated the most common outdoor activities pursued by Canadian and U.S. travellers. The activities are wildlife viewing (36 percent), wildflowers/flora viewing (28 percent), hiking or backpacking in wilderness settings (22 percent), bird watching (14 percent), kayaking or canoeing (13 percent), and whale watching (12 percent). Some of these activities can be programmed in the Carbonear area and on Carbonear Island (such as bird watching).

The TAMS survey also identified common outdoor activities more likely to be sought during future travel (relative to last two years). The growth areas are hiking or backpacking in wilderness settings (+five percent), kayaking or canoeing (+six percent), whale watching (+seven percent), white water rafting (+eight percent) and mountain biking (+three percent).

It is important to note that there is significant interest and demand for Canadian adventure products at the annual Rendezvous Canada event, the annual marketplace organized by the Canadian Tourism Commission.

3.3.4 Motorcoach

While not the primary focus of the strategy, this market will continue to visit the Carbonear area. By broadening the retail base, more local sales will result but it is not expected that motorcoach group tours will be a primary market for Carbonear Island.

The most recent benchmark study on the Canadian and U.S. motorcoach market was completed in 2000 by the American Bus Association. According to this source, the motorcoach industry has about 44,000 commercial motorcoaches in the U.S. and Canada. There are also 4,000 private motorcoaches with 10 percent in Canada. As many as 65 percent of known carriers operate less than 10 buses. A total of eight percent of motorcoach miles logged are on tours or sightseeing.

A fully loaded motorcoach (46 passengers on average) on a charter or tour making an overnight stay can contribute up to \$7,000 per day to the local economy in expenditures

for meals, lodging, shopping, admission fees, souvenirs and local taxes. Operator sales volumes come from:

- Direct to consumers - 41 percent
- Group leaders - 36 percent
- Travel agents - 11 percent
- Other tour operators - 11 percent.

Passenger types are as follows:

- Students - 15 percent
- Young adults - 3 percent
- Baby boomers - 8 percent
- Future seniors - 18 percent
- Seniors - 56 percent.

Most passengers come from North America as only six percent are from international origins. The top 10 tour/package types are as follows:

- Historic/Heritage - 79 percent
- Fall foliage - 79 percent
- Cruises - 78 percent
- Events - 72 percent
- Dinner Theatre - 72 percent
- Theatres - 70 percent
- Museum - 66 percent
- National Parks - 65 percent
- Holidays - 63 percent
- Cultural - 61 percent.

The Department of Tourism, Culture and Recreation does not collect data on the group tour market. The American Bus Association prepares the top 100 events on an annual basis. In 1997, this trade association for the intercity motorcoach industry awarded the Matthew Visit of the Cabot 500th Anniversary Celebrations and Oregon's Portland Rose Festival as the top tourism events. For 2004, the Signal Hill Tattoo (St. John's) makes the top 100 list.

While not a primary market for the strategy, the Province of Newfoundland and Labrador has a positive image and profile with the motorcoach group tour market. This image can be linked to Downtown Carbonear if upgrades facilitate pre-organized stops.

An indicator for motorcoach activity is available from Marine Atlantic. This ferry operator classifies motorcoaches as buses. This category also includes school buses and private buses. Inbound statistics are presented in the following exhibit. In the range of 40 percent of all Marine Atlantic passengers reside in Newfoundland and Labrador.

Exhibit 3.33			
Bus Inbound Activity on Marine Atlantic			
Year	North Sydney to Port Aux Basques	North Sydney to Argentia	Total
1999	337	24	361
2000	272	24	296
2001	418	73	491
2002	403	65	468
2003	374	82	456

Source: Marine Atlantic

3.3.5 Recreation Vehicle Travel (RV Travel)

There are no data sources that provide a complete picture of RV activity in Newfoundland and Labrador. Camping-Canada.com lists 27 RV dealers in the province (2004) while Marine Atlantic collects data on vehicles using the Port aux Basque and Argentia services to North Sydney. Marine Atlantic groups RVs in the Camper category. It should be noted that around 40 percent of all Marine Atlantic passengers are from Newfoundland and Labrador.

Exhibit 3.34			
Camper (Including RV) Inbound Activity on Marine Atlantic			
Year	North Sydney to Port Aux Basques	North Sydney to Argentia	Total
1999	1,936	517	2,453
2000	1,773	540	2,313
2001	1,638	568	2,206
2002	1,933	612	2,545
2003	1,804	562	2,366

Source: Marine Atlantic

While not a primary market for the strategy, this segment can increase local economic benefits by day trips and overnight stays in the Carbonear area. The touring segment of this market is already coming to Newfoundland and the Carbonear area.

3.3.6 Cruising



Over the 2001 to 2003 period, an average of 23,390 cruise ship passengers visited Newfoundland and Labrador. While these numbers are small, the cruise industry is one of the fastest growing markets in the tourism industry and continues to grow in popularity annually. The main cruise port in Newfoundland is St. John's, and the Cruise Associate of Newfoundland and Labrador (CANAL) and the Atlantic Canada Cruise Association

promote the region. While currently not a primary market for the Carbonear area, it is worth noting.

The Cruise Lines International Association (CLIA) estimates that between 1995 and 1999 passenger growth increased at 5.9 percent annually, while new ship berths increased at an annual rate of 7.7 percent. Much of the new capacity in 2000 was going to Canada, New England, Africa and the U.S. East Coast. Alaska in 1999 had 9.0 percent of market share while the Caribbean had 36.0 percent, the Mediterranean had 13 percent, Europe 8.0 percent and the Bahamas had 7.0 percent. Since the events of September 2001, security concerns and a strong U.S. dollar have resulted in Europe becoming the top (summer) cruise destination.

In March 2004, the CLIA released a cruise buyer profile. Baby Boomers are the core of the cruise market. Thirty-four percent of cruisers are between the ages of 35 and 54. Three in four (76 percent) cruisers are married, and two in five (44 percent) are college graduates. Only one in four (25 percent) cruisers are retired.

Families are an important segment of the cruise market. While a spouse is the most likely cruise companion, 16 percent of cruisers bring children under age 18 along on a cruise.

Cruisers are also frequent travellers. They average 3.8 vacation trips a year and 18.6 nights away from home. Recent cruisers (those who have taken a cruise in the past three years) average 4.5 leisure trips a year and 20.8 nights away from home. Cruisers allocated nearly twice as much to leisure travel as the average vacationer - an average of \$5,500 for all cruisers and \$7,250 for recent cruisers.

Most cruise vacationers go back to sea again and again. The average cruiser has taken three (2.8) cruises in his lifetime, and two of them (1.6) occurred within the past three years.

When cruisers are compared to other segments (such as motorcoach), additional differences come to light that are important for the Carbonear area. Recent cruisers are

among the most venturesome of leisure travellers. They seek new experiences, search for undiscovered destinations and are quite comfortable in other cultures. This profile suggests an opportunity to link Carbonear Island to the adventure cruise market (smaller vessels) or day trips for larger vessels docking in St. John's.

Researched by the CLIA has also determined that cruising is important for travellers to sample destinations to which they may return for land-based vacations. Many small East Coast communities express a desire to focus efforts on the expedition cruise sector rather than trying to attract the larger cruise ships that are common in ports like St. John's. The Baccalieu Trail is unique and offers potential for this market. To tap this market, communities need to be "cruise visitor friendly" in order to enhance the experience for cruise visitors and to maximize the local benefits.

IV Product Assessment

4.1 Introduction

The purpose of this section is to review the local setting against the needs and expectations of the markets. This section presents a summary of the product analysis and concludes with the product-market match and identification of potential priority target markets for the Carbonear Island Development Strategy. This section also includes three case studies intended to show how tourism related activities could be achieved in sensitive areas.

4.2 Carbonear

Carbonear, with a population of approximately 5000, is located on the Avalon Peninsula on Newfoundland's East Coast. It is one of the largest towns on the touring route called the Baccalieu Trail. It has a full range of services expected in a modern town, including a regional shopping centre, regional community centre, a modern library, regional hospital, and a large recreational facility, which includes an indoor swimming pool, tennis courts, a basketball court, baseball fields, a soccer field, an athletic track and an outdoor stage and grounds known as "Paddy's Garden". There is an extensive boardwalk through the area immediately adjacent to the Community Center.



Heritage structures, churches, museums, and monuments contribute to the historic feel of the Town. The Town's rich cultural history includes pirates, a princess, prosperous international trade, a lucrative fishery and significant battles. At the entrance to Carbonear Harbour is Carbonear Island, the site of a number of these battles between local settlers and a French invasion force. The defence of the Island has been designated as an event of historical significance.



The Conception Bay Regional Community Center houses a modern theatre that provides first class concerts and theatricals including the NaGeira Theatre Festival. The Community Center also houses the Carbonear Town Council Offices, and the Public Library.

The Carbonear Museum is located in the old Railway Station, next door to the Regional Community Center. The Museum is a "must see" historic attraction for it provides insight into the Town's fascinating history. On



display are railway artefacts, community memorabilia, and a permanent exhibit called "Going Foreign" which interprets the schooner trade between Carbonear and Atlantic and Mediterranean ports between 1870 and 1930. Cemetery records are also housed in this building.



The Rorke Premises is an example of fish merchant premises in Newfoundland. John Rorke, a native of Athlone, County Caven, Ireland came to Newfoundland as a clerk. In 1838 he moved to Carbonear and bought out the premises of an existing business. The Rorke Stores, which were constructed entirely of wood, were built in the 1870s and remained in use for about 100 years. They form an integral part of the mercantile history of the community, as well as the fishing heritage of the region.

Across the street from the site of the Rorke stores stands Rorke's Stone Jug, commonly referred to as the Stone House. It is the oldest existing building on Water Street. This building, constructed around 1863, was made of stone slabs from Kelly's Island in Conception Bay. The ground floor was used for commercial purpose while the upper floors were living quarters for the family.

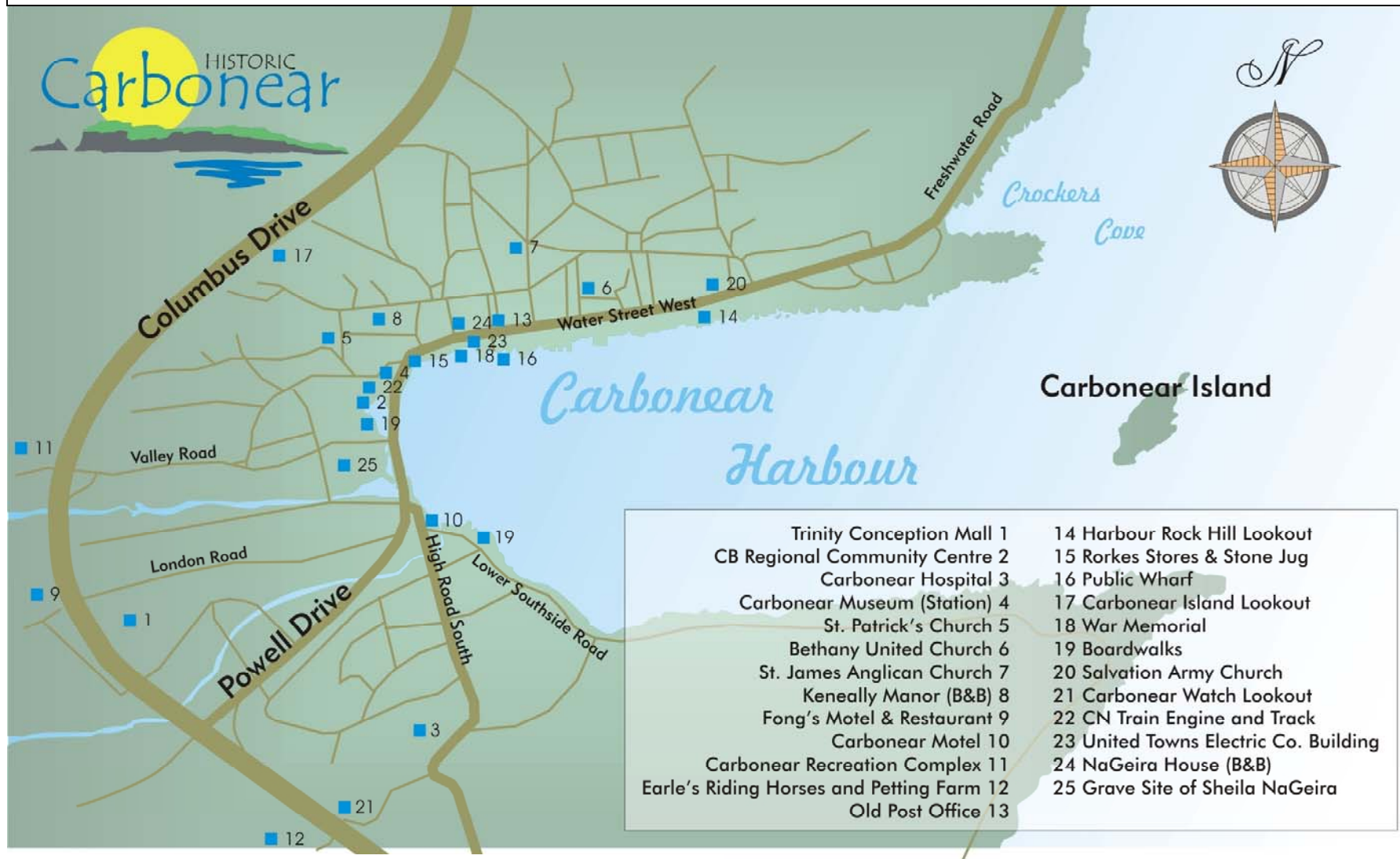


There is also a romantic side to the Town's past. According to legend, Sheila NaGeira was a young Irish woman of noble birth, who became the "Carbonear Princess." As the story goes, in 1602 Dutch pirates captured Sheila's ship, crew, and passengers. Peter Easton, who at that time was a privateer in the service of Queen Elizabeth I, freed the captives and took them to Newfoundland. During the trip to Newfoundland, Sheila and Gilbert Pike, Easton's navigation officer, fell in love and married. The couple eventually settled in Mosquito Valley, now known as Bristol's Hope and later in Carbonear. Sheila became a model pioneer woman. Her gravesite is in the small park off Pike's Lane in Carbonear.

The Carbonear coastline offers breathtaking scenery and numerous photo opportunities especially at the designated lookouts and along the road to Freshwater.

Exhibit 4.1 locates the main points of Interest in Carbonear.

Exhibit 4.1 Places of Interest in Carbonear



4.3 Carbonear Island Archival Research

4.3.1 Work Scope

Carbonear Island has long been recognized by federal and provincial agencies and the general public as a site of considerable historic significance. It has a high degree of potential for development of existing ruins and structural elements and for interpretative purposes. Consequently, a key component of the current development strategy involved completion of a comprehensive archival investigation into the use and occupancy of the Island as a place of defence, seasonal “fishing room” and navigational light station. Focussing on a review of primary sources, including maps, plans, photographs and correspondence, substantial material covering the period 1690s to c.1950 was obtained from archives in St. John’s, Ottawa, London, and Paris. As well, a number of individuals familiar with the island were contacted and interviewed.

As the archival research proceeded, it became evident that in addition to an evaluation of the documentary record, a field reconnaissance of Carbonear Island would be critical from the point of view of locating and assessing any obvious physical remains associated with the island’s past and identifying other areas of historic resources potential not indicated on site mapping. Moreover, a field trip would provide an opportunity to gauge the accuracy and degree of confidence that could be placed in the military and civilian correspondence and drawings. Given that Carbonear Island is a registered archaeological site and protected under provincial legislation (Government of Newfoundland and Labrador 1992), the data compiled now form the basis of any historic resources assessment requirements that may be triggered by proposed activities.

The combined results of the archival research, field reconnaissance and informant interviews are summarized below: a more detailed report on the work (complete with endnotes and a bibliography for all material consulted) is included in the Appendices.

4.3.2 Archival Research Results

4.3.2.1 The Civilian Fortifications (1690s - 1713)

The fortifications erected on Carbonear Island were a function of the defence needs of the seventeenth and early eighteenth century migratory fishery and reflect the economic and social changes that occurred within the industry after the mid-point of the eighteenth century. In the late seventeenth and early eighteenth centuries, it was the industry that was the focus of government defence policy and not necessarily the resident population and infrastructure of settlements along the English Shore. This approach followed the consistent legislative discouragement of local settlement in favour of West country fishing interests. It was accepted doctrine at the time that these undesirable and dispersed settlements were indefensible and expendable, with the only possible means of defence of the coast and the fishery being sea power.

It was for these reasons that the first English fortifications erected in Newfoundland were makeshift, civilian works built by the planters themselves with little or no official sanction or funding from the Crown. They were to be used primarily (but not exclusively) during the winter after the migratory fleet had departed for the year. Essentially, they were places of refuge, such as islands and defensible headlands, where the resident population could retreat and shelter themselves and “a portion of their effects” during times of conflict between the combatant states of Britain and France: long political and economic rivals in the struggle for control of the increasingly important Newfoundland fisheries.

The earliest documented reference discussing the need for fortifications at Carbonear is contained in a proposal submitted to the Board of Trade for Newfoundland in 1679 by two prominent St. John’s merchants, William Downing and Thomas Oxford. Given that Carbonear at that time was reported to be the leading settlement in Conception Bay and second only to St. John’s with a total population of 57, it seems likely that the business interests of these individuals must have extended to the local area. Itemizing the defence requirements for a number of settlements along the east coast of Newfoundland, the proposal states that there is a need “...to fortify Carboniere with fifteen guns and eighty small arms.” Although it has been assumed by several writers that the document is referring specifically to Carbonear Island, this is not made entirely clear from the portion of text available for review. It is uncertain, therefore, whether any defence structures, such as earthen gun emplacements or crude accommodations, were erected on Carbonear Island at that time.

As the importance of the fishery steadily grew in the late seventeenth century, Britain and France were struggling for control of Newfoundland. Whenever war was declared, England’s enemies would attempt to cripple her fighting ability by attacking trade and commerce. The French capital of Placentia, established in 1662, was seen as a genuine threat to the English settlements on the Avalon Peninsula and in the bays to the north. In the fall of 1696, during what is referred to as the War of the League of Augsburg (or King William’s War), Pierre Le Moyne d’Iberville returned to the French colonies from France to wage a “Winter War” in Acadia and Newfoundland to rid, once and for all, the English from North America. Details of the campaign recorded by Abbe Boudoin, a Recollett monk who accompanied the troops, provide significant insight into the English occupation of Conception Bay in general and Carbonear Island in particular, where up to 300 inhabitants from the area were reported to have retreated and erected defensive works and shelters to secure themselves and their “effects”. Despite several attempts to land, all efforts proved unsuccessful. Ultimately, d’Iberville departed for Placentia, after having destroyed most of the communities and fisheries infrastructure in Conception Bay. Over the course of the conflict, d’Iberville caused extensive damage in English Newfoundland. He burned over 30 settlements, killed approximately 200 settlers and took some 700 prisoners, 400 of whom were transported to augment the populations of Quebec & Acadia.

The Peace of Ryswick signed in 1697 put a temporary halt to English and French quarrels in Newfoundland. However, only five years later hostilities again broke out between the two European powers, resulting in a renewed French effort to wipe out English settlements in Newfoundland. As to the facilities in place on Carbonear Island during the winter of 1696/97, the Boudoin journal suggests that, at very least, there were some form of accommodations or shelters for the inhabitants of the region. Further, it appears

that there were likely earthen Intrenchments and possibly Gun Emplacements for 6-pound cannon at the southwest end of the Island overlooking the only practical landing place. Given the nature of the threat, it is likely that any structures would have been hastily erected for what would likely be a temporary, winter occupation. Even if the number of individuals residing on Carbonear Island was somewhat less than reported (which appears likely), archaeological remains from the period would almost certainly be present.

In the early eighteenth century, during Queen Anne's War (notably in 1705), French troops again attempted to take Carbonear Island after residents had retreated there following the outbreak of hostilities. Even though the resident population of Newfoundland during that period was still largely responsible for their own security and the protection of the fishery, the Crown was providing an increasing degree of assistance in the form of arms. Correspondence indicates that approximately 130 people from the area resided on Carbonear Island during the winter of 1711, a number that may represent a reasonable average for the entire conflict. Despite considerable efforts to capture the island, similar to the previous war, all proved unsuccessful; a fact that speaks volumes to the ease with which the island could be defended.

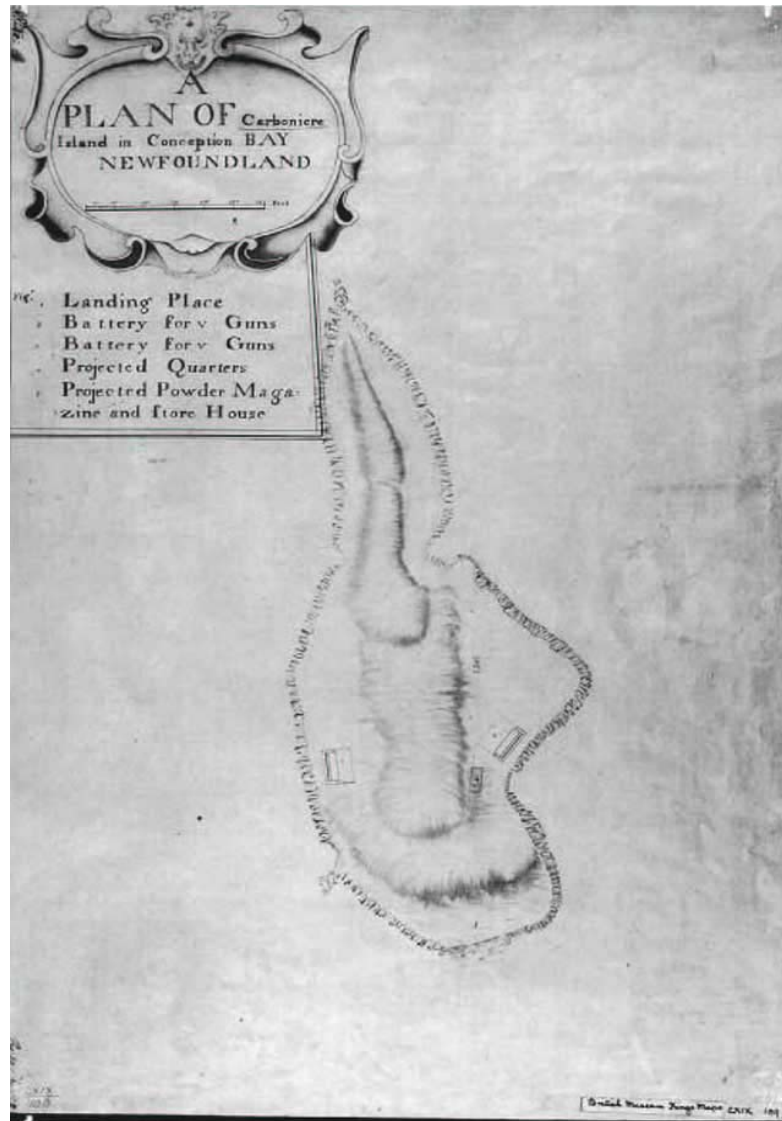
By 1712, British victories in Europe had brought about an armistice, and in the Treaty of Utrecht signed the following year, the French yielded all rights in Newfoundland to Britain and were forced to leave Placentia. This key political event marked the end of the use of civilian fortifications on Carbonear Island. It is reasonable to suspect that similar to other temporary civilian fortifications along the east coast, those on the Carbonear Island, no longer being required, rapidly fell into an advanced state of disrepair. There is a strong probability, however, that it continued to be used for the seasonal fishery and for small-scale agriculture.

4.3.2.2 Construction Of Fortifications (c. 1740 to 1762)

Although conflicts between Britain and France had officially ceased, concerns about the requirement for a military presence to maintain control of the fishery continued to be raised. In 1739, for example, a petition was presented to the Lord Commissioners of the Admiralty by several London merchants with trading interests in Newfoundland. The document claimed that, due to the defenceless state and condition of the island, His Majesty should fund the construction of several forts or, at very least, encourage the inhabitants of the different "out harbours" to do so. Moreover, the settlements in question should be furnished with the necessary arms and stores for the proper protection of so valuable a trade as the fishery, which, at the time, was also considered to be the principal "Nursery of Seamen" for the Navy. In another similar document, it was stated that in the event government should decide not to erect fortifications at the "Public Charge", the inhabitants should do so at their own expense, but with the ironwork and provisions provided by the Crown. It was also suggested that a militia with a commanding officer be established at each place. For the service of Carbonear, 12 Cannon and 150 small arms with powder and ball would be required.

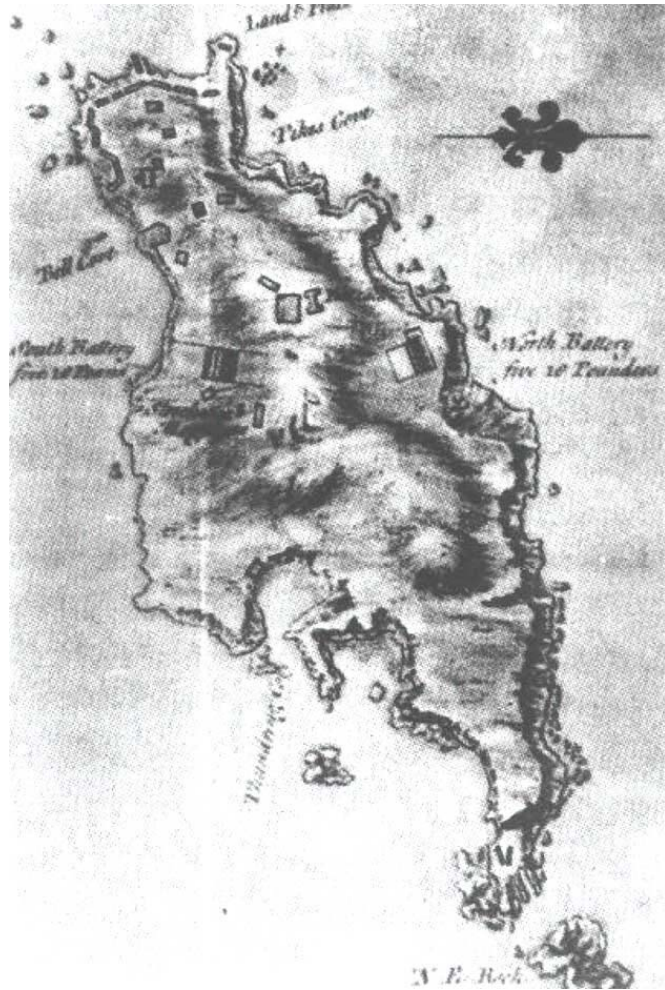
The outbreak of war in the 1740s (War of Austrian Succession or King George's War, 1743 to 1748) saw a resurgence of activity and, for the first time, a number of facilities were designed and constructed on the Island by the Board of Ordnance under the direction of Royal Engineers, thus marking a notable transition in the way government

viewed protection of the Newfoundland fishery. Similar works were also constructed at Ferryland and Trinity, Trinity Bay. Mapping of Carbonear Island from c. 1746 and c. 1747 shows the military facilities put in place at that time



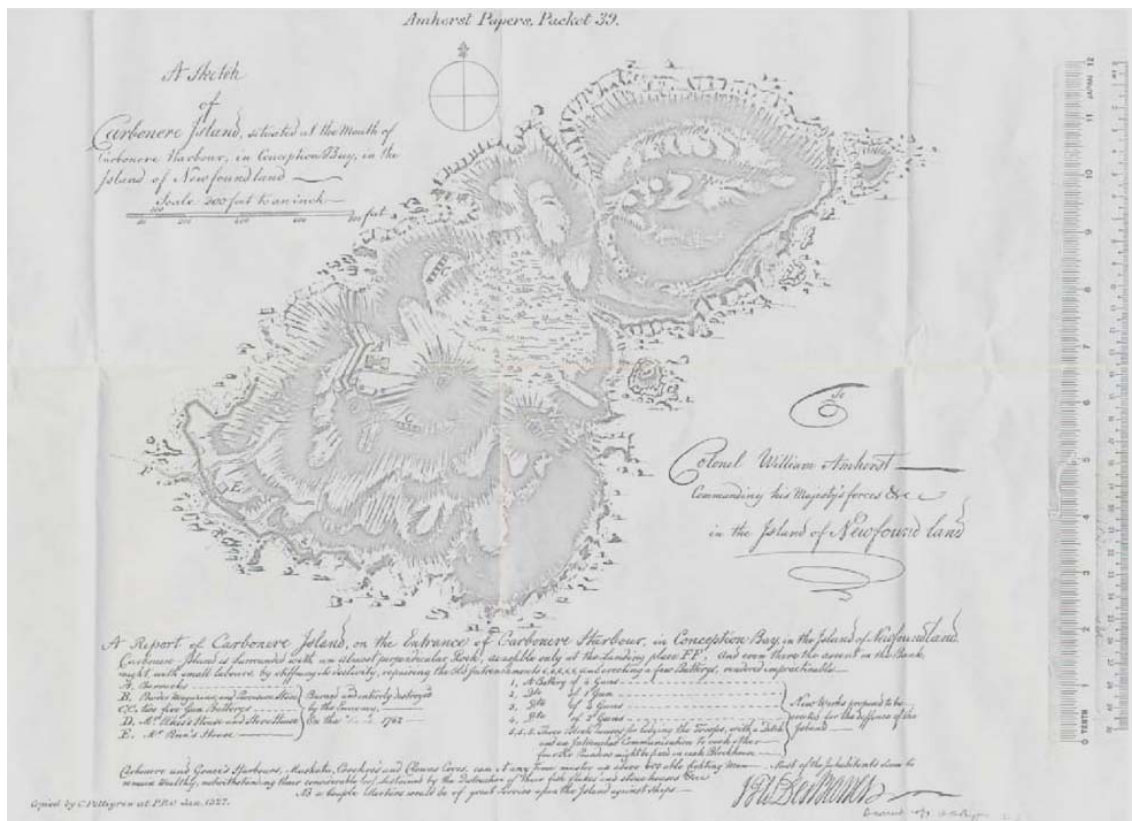
War with France officially came to an end in 1748. Over the course of the entire conflict, no direct military action had occurred in Newfoundland. In a effort to ensure that the fortifications on Carbonear Island were kept in a state of readiness and did not fall into a complete state of disrepair, a contract for upkeep was awarded by the Board of Ordnance to a Mr. Steward.

A second plan of Carbonear Island thought to date to c. 1750 was also located during the archival research. It is a particularly skilful representation of the island, showing stylized vegetation and relief pictorially and by shading. It also includes a number of buildings at the southwest end (possibly owned by Pike and/or Pynn and used for the seasonal fishery), as well as a line of Intrenchments along the edge of the embankment overlooking the Landing Place, two five-gun Batteries, a Magazine and Storehouse, the I-shaped Barracks and Quarters with what is likely an adjacent Privy, a number of Gardens (possibly for vegetables) and what may be a Guard Room or lookout on the height of land at the northeast end of the island. A number of prominent landmarks are also noted, including Pike's Cove, Thundering Cove and Bell Cove. From a historic resources research and development point of view, the plan of Carbonear Island dating to c. 1750 is an invaluable source of information for assessing the site's archaeological and interpretative potential.



With the outbreak of war in 1756 (Seven Years War, 1756 to 1763) came a renewed effort to ensure that the fortifications on Carbonear Island were promptly put into a renewed state of readiness. Even though the troops listed for that year consisted of only one Gunner and one Mattross, in 1757, an Officer was directed, without loss of time, to proceed to Ferryland, Trinity, and Carbonear to conduct a thorough survey of the fortifications and report back as to their state and condition and whether or not they had been maintained according to the terms and conditions of the contract awarded to Mr. James Steward by the Board of Ordnance on the 10th of April, 1750.

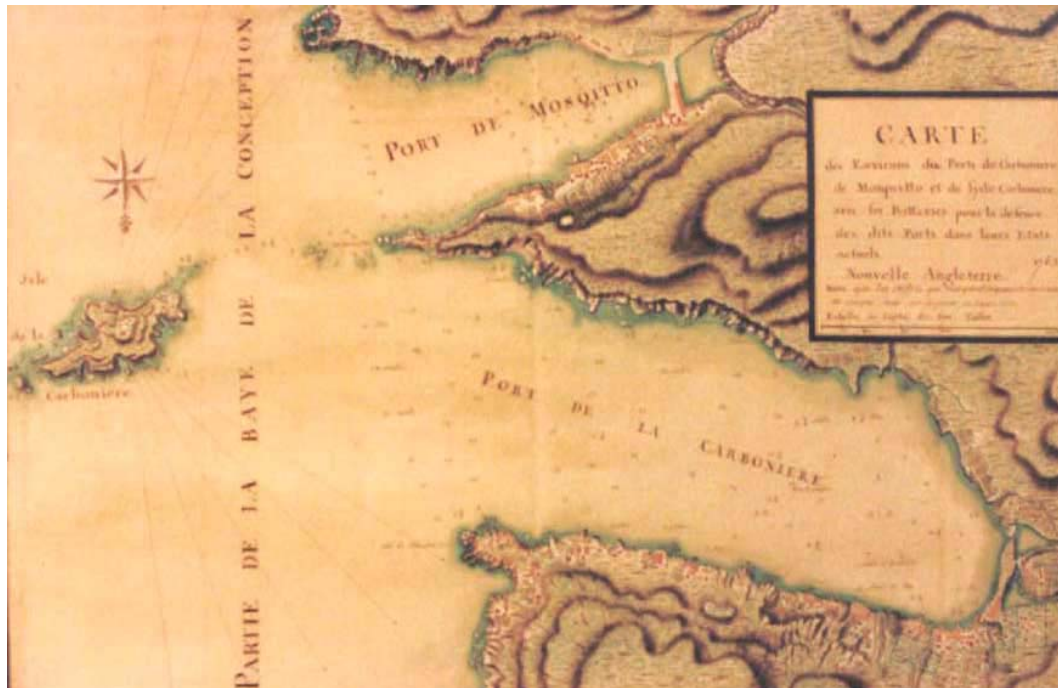
In the fall of 1762, the final military engagement between Britain and France in Newfoundland (and in British North America, for that matter) occurred. The British victories at Louisbourg (1758), Quebec City (1759) and Montreal (1760) virtually ended the French presence in North America and led to the opening of peace negotiations under conditions of great disadvantage to France. In a final ditch effort to gain bargaining power, the French government dispatched a naval force with approximately 800 troops to attack Newfoundland. On June 24th, 1762, French troops under the command of Colonel Le Comte d'Haussonville landed at Bay Bulls and proceeded overland in a northerly direction. Three days later they successfully invaded St. John's with hardly a shot fired. Subsequently, a number of small fishing craft were refitted and set sail to the north to disrupt the British fishery in Conception Bay and Trinity Bay, and to pillage food and resources to help support the occupation of St. John's. At Carbonear, because the fortifications on the island were reported to have been unmanned and in an advanced state of disrepair (as an attack at that point in time when the war was drawing to a close was thought unlikely), in mid-August French troops more or less walked ashore unhindered, occupied the site for a brief period, and burnt and destroyed all existing structures prior to departing. A detailed drawing produced shortly after the French withdrawal from the area shows the range of structures (military and otherwise) in place on Carbonear Island at the time of the French occupation in 1762.



A leading figure in the French force during the campaign of 1762 was Cartographer Marc Antoine Sieur de Cinq Mars. During the 11-week occupation of the east coast of Newfoundland he made observations and measurements and supervised the gathering of field data, which the following year was transcribed into detailed colour plans at

Toulon, France. The complete set of de Cinq Mars' drawings, which include plan and sections perspectives of St. John's, Ferryland, Carbonear, Placentia and Trinity Harbours, illustrate that the French had executed a well-designed strategy to gather intelligence on the characteristics of the principal merchant settlements in Newfoundland and how they were defended.

The de Cinq Mars area overview entitled, *CARTE des Environs du Ports Carboniere de Mosquitto et de l'isle Carboniere avec ses Batteries pour la defence des dits Ports dans leurs Etats actuelle. 1763, Nouvelle Angleterre*, is very detailed indeed as regards the natural and cultural landscape of that part of Conception Bay. In Carbonear, for example, he shows numerous buildings, wharves, flakes and gardens situated along the waterfront and slightly inland on the north side of the harbour. He also depicts a similar degree of occupation on the south side of "Port De Mosquitto".



In fact, the area-drawing is so detailed and shows so much more development than indicated by the contemporary English illustrations that one wonders, in the first instance, if it is accurate and, if so, how the French Cartographer and his team could have compiled that amount of information in so short a period of time. One must bear in mind that the French occupation of the east coast of Newfoundland was only 12 week or so and during that period, five settlements, including St. John's, were surveyed and undoubtedly sketched - an extraordinary feat by any standards. Nonetheless, the question of accuracy still remains. Given that the combined winter population of Carbonear and Mosquito in 1753 was reported to be 622, with that number probably doubling or even tripling in summer, the amount of activity indicated for August of 1762 could well be correct and not the product of embellishment for political or personal gains. Unfortunately, the only reference made in de Cinq Mars' report obtained from France for this study about these two settlements was that neither appeared to be very well protected from the sea but, nonetheless, were key ports with considerable infrastructure in place for preparing and drying cod fish. It is not surprising, therefore,

that the cannon on Carbonear Island were positioned strategically to secure the entrances into those harbours.

The detailed drawing of Carbonear Island prepared by de Cinq Mars in 1763 from data collected the previous summer is equally valuable from the point of view of understanding land use. Entitled, *PLAN Particulier de L'isle de la Carboniere En Amerique Relatif a la Carte de Cette partir avec lesprojets pour la defence et celle des ports de la Carboniere et Mosquitto dans la baye de la Conception, Nouvelle Angleterre*, it shows what was in place on the Island in 1762 prior to being destroyed. It also shows the extensive facilities proposed for construction at the southwest end in the event France retained control of the area.



The fact that the French Engineers produced the plan and section drawings for improvements to the fortifications, suggests, perhaps, that they too thought it a good location for the defence of these key settlements.

As regards the additional works proposed for Carbonear Island, listed under the heading Projects, it would appear from the drawing that the majority would be situated at the southwest end overlooking the Landing Place where any attempted assault would most likely occur. Included in that general area would be more extensive earthworks and Intrenchments, additional Batteries and a Guard House, as well as a wharf or docking facility situated off the most prominent point of land near the narrow beach. Directly to the west of the I-shaped Barracks and Quarters completed by Royal Engineers c. 1748, there would be two new buildings constructed as accommodation for Soldiers and Officers. Nowhere on the French plans or in the associated correspondence is it implied or clearly stated that the fortifications and civilian buildings on Carbonear Island were destroyed in 1762.

In summary, the two plans of Carbonear Island from the 1760s are extremely valuable illustrative resources that provide further insight into the extent of occupation in the mid-

eighteenth century by military and civilian personnel. They confirm that, in addition to Board of Ordnance properties (which by that time may have been in a state of disrepair), there were several other buildings owned by residents of the area (including a Mr. Pike and a Mr. Pynn) that may have been used at certain times of the year for fisheries-related activities. Moreover, the drawings indicate that at that time several areas of the Island had been developed for vegetable gardens.

4.3.2.3 Post-1763 (Withdrawal From Carbonear Island)

The signing of the Treaty of Paris in 1763 officially marked the end of military activities on Carbonear Island. Despite the fact that it continued to be used as a seasonal fishing room well into the twentieth century, the facilities put in place or upgraded by the Board of Ordnance in the 1740s for the defence of the area were never rebuilt. Even during the American Revolution of the late 1770s and early 1780s (when, on a number of occasions, privateers disrupted the fishery and threatened several communities), and the Napoleonic Wars that persisted from 1793 to 1815, no reference is made in documents to fortifications being raised on Carbonear Island. It appears that during both those conflicts, defence facilities were established directly in the communities of Carbonear and Harbour Grace.

4.3.2.4 Construction and Maintenance of Lighthouse

In 1878, a lighthouse and residence for year-round occupancy was erected on the northeast end of Carbonear Island and was maintained until c. 1928, when it was demolished. Subsequently, an automated light station was installed, which is still used to this day.

4.3.3 Field Reconnaissance

The field reconnaissance of Carbonear Island proved extremely useful. The remains of several eighteenth century structures associated with the military history were assessed and plotted on a site plan. The state of preservation of these remains was determined to be good and no unauthorized excavation was noted. A number of nineteenth century structures associated with the lighthouse built in 1878 were also investigated, as were other features and areas on the Island that have significant historic resources potential. Included, for example, could be a pre-European, Aboriginal occupation, as well as evidence of an early fishery and materials related to the seventeenth century French attacks.



- Area A Landing Place
- Area B Inrenchments: c. 1690s - 1762
- Area C Mr. Pike's House and Store: c. 1750 - 1762
- Area D Mr. Pinn's House and Store: c. 1750 - 1762
- Area E Magazine, Ordnance and Provision Stores: c. 1747 - 1762
- Area F Barracks: c. 1748 - 1762
- Area G Prives: c. 1748 - 1762
- Area H Horn Battery: c. 1748 - 1762
- Area I Cape Horn
- Area J-1 South Battery: c. 1748 - 1762
- Area J-2 Garden
- Area J-3 Garden
- Area K Undersified Structure: c. 1750
- Area L Lighthouse: 1878 - c. 1927
- Area M Road to Lighthouse: c. 1878 - c. 1927
- Area N Possible Barr: Late 19th Century - c. 1920s
- Area O-1 Undersified Structure
- Area O-2 Undersified Structure
- Area O-3 Undersified Structure

Figure 4.14
CARBONEAR ISLAND
SITE PLAN

4.3.4 Summary and Conclusions

It is evident from the archival and field data presented above that Carbonear Island is a site of considerable historical significance, with a long-standing and diverse past dominated by several episodes of military or defence-related activities, but also including a seasonal fishery that may have persisted at varying degrees of intensity from the late sixteenth or seventeenth century to c. 1950. Site mapping leaves little doubt that it was established by at least the mid-eighteenth century. In more recent times, a lighthouse was constructed on the height of land at the northeast end that was subsequently demolished and an automated system installed, which is still in use to this day.

Carbonear Island represents a kind of microcosm of the evolving state of the Newfoundland fishery and economy, and the measures and means put in place - initially by the inhabitants themselves and ultimately by government - to ensure the long-standing dominance of it and the continued flow of resources to and from the Old World. As regards interpretation or future research potential, there is an obvious link between the various aspects of Carbonear Island's past, as there is with the navigational light station established in 1878 to provide yet another type of security to the fishery and shipping in general. In the event it is established that Aboriginal peoples did, in fact, travel to the island in pre-contact times, this too would add still another dimension and level of understanding of the prolonged exploitation of the maritime resources of this area of Conception Bay. From an archaeological research perspective, the fact that the Island would appear to have experienced predominately low-impact activities - such as farming and the movement of earth and stone for construction of buildings and defence works - could indicate that historic resources have seen relatively little disturbance. Consequently, evidence related to a prolonged history of intermittent use and occupancy could be present.

4.4 External Factor Assessment

It is important that the strategy be framed by factors that may influence growth of the local tourism sector. This section reviews the keys factors that were considered in preparing the strategy.

Increasing Product Sophistication

Both domestic and international tourists are becoming more sophisticated and global in their travel planning and itineraries. This trend has resulted in tourism products becoming increasingly segmented. For example, the diversification of the Elderhostal program to include family products, and the segmenting of accommodation to include boutique hotels, all-inclusive resorts, farmstays, homestays and ecolodges. In an increasingly urbanized world of change, the Carbonear tourism experience offers a reconnection with authentic heritage and cultures. In this setting, it is important for the local tourism sector to use technology where it makes sense (i.e. marketing), but focus on

what is authentic (from performances to signage materials) and feature interaction with local residents and the natural environment. The programming for Carbonear Island and other interpretations should be presented from a local perspective with unique differences highlighted. By following this approach, the local setting will be differentiated in an international context.

Concern for the Environment

Section III discussed the Quebec Declaration on Ecotourism and how this international framework can be applied to the strategy. This protocol adheres to the World Tourism Organization (WTO) definition of sustainable tourism development:

“Sustainable tourism development is tourism that meets the needs of present and future tourists and host regions while protecting and enhancing opportunities for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems.”

There is wide acceptance of the need for sustainable tourism development while the Quebec Declaration has increased awareness and interest in the principles of ecotourism. The strategy is cognizant of these trends as the local area has a sensitive cultural and heritage resource base.

The Internet

Research by many organizations and government tourism agencies confirms that the Internet will account for more travel purchases. The Internet allows potential travellers to see a product and to rank and compare options. The low cost of the Internet is relevant in the Carbonear area where most operations are small businesses without budgets for traditional marketing tactics. The local tourism industry must ensure that the products throughout the local area are displayed in this medium in an entertaining and informative manner.

The Carbonear web presence must be professionally designed and maintained for ease of interaction and simplicity of booking and itinerary planning.

Quality and Value

Value is defined as price plus quality. With increased visitor sophistication, more emphasis is being placed on the value of tourism experiences. In this context, the strategy should be developed to achieve the following:

- The consumer must receive what has been promised or even more. This is called the price-value relationship.
- If high quality is guaranteed and the product is exceptional, then the product or experience can command a high price. Some accommodation operators and retailers have resources to develop products for high yield tourist markets. This is called a price-directed strategy.

- Quality determinants such as hygiene, safety, accessibility and cultural authenticity must be met.

4.5 Case Studies

4.5.1 Haida Gwaii, Queen Charlotte Islands, BC

Haida Gwaii (The Queen Charlotte Islands) is the largest archipelago off the Canadian west coast. The archipelago is comprised of more than one hundred sixty islands scattered around two main islands, and stretches 300 km north-to-south, 80 km off the mainland.

A total of more than 500 archaeological and historical sites have been documented in the Gwaii Haanas, and it is believed that at the height of the Haida culture there were as many as 120 Haida villages and camps. The population was estimated to be some 10,000 to 30,000 at that time. In 1774, the first Europeans arrived. Over the ensuing 100 years, the Haida population was almost wiped out by disease. By 1900, there were only 600 people remaining in two permanent villages. The western red cedar was the cornerstone of the Haida culture.



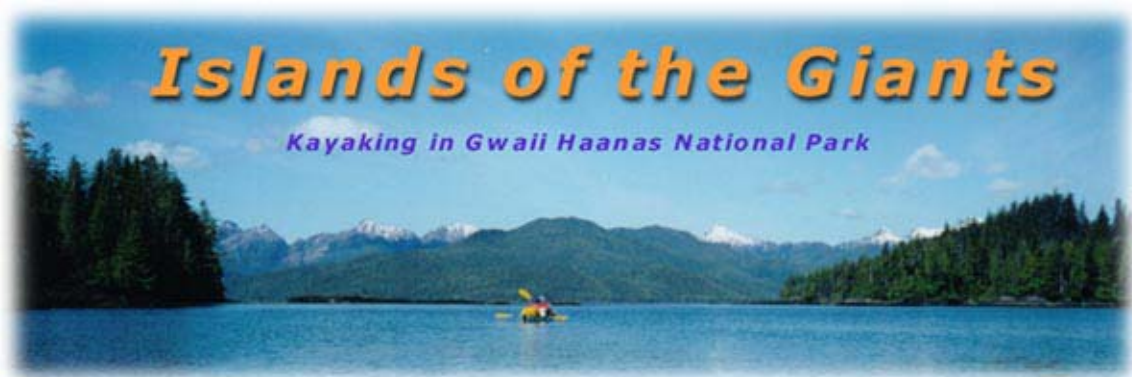
The natural environment on the islands is also very unique. In fact, the Gwaii Haanas are often referred to as the Galapagos of the North, with as many as 39 unique species and sub-species.

During the 1970s and 1980s, the environmental and Haida communities waged a battle to stop logging activity in the southern portion of the islands. In 1985, under the authority of the Haida Constitution, the South Moresby area was designated a Haida Heritage Site. Logging continued until 1987 when Canada and British Columbia signed a Memorandum of Understanding to designate the Gwaii Haanas as a National Park Reserve. The resulting South Moresby Agreement committed \$106 million to the development of national parks for both the marine and terrestrial areas; compensation of forestry interests; the creation of a regional economic development fund and a forest replacement account.

Following six years of negotiation, the Gwaii Haanas Agreement was signed establishing a co-operative management relationship. Common objectives for the care, protection and use of Gwaii Haanas were defined. It also provided the framework to make recommendations on planning, management and operations issues to both the Government of Canada and the Council of the Haida Nation. This framework provided for the formation of the Gwaii Haanas Archipelago Management Board (AMB), with equal representation from the Haida and Parks Canada, the body charged with the consensus decision-making process.

The agreement stipulates the following:

- The Council of the Haida Nation has designated the lands and waters in the Gwaii Haanas area as a Haida Heritage Site.
- The Government of Canada intends to designate certain lands and non-tidal waters in the South Moresby area as a National Park and a National Marine Park.
- The Archipelago is to be maintained and made use of so as to leave it unimpaired for the benefit, education and enjoyment of future generations.
- An objective is to sustain the continuity of the Haida culture.
- Traditional Haida sustainable activities will continue to be allowed in the area.
- The Minister of the Environment funds the participation of the Haida Nation in the AMB as well as providing funding for contracts relating to operation and management of the Archipelago.
- Haida individuals are encouraged and given opportunities for employment with the Canadian Parks Service.



In 1981, the Skidegate Band Council and the Haida Nation set up the “Haida Watchman Program” in response to concerns about the potential for vandalism and other damage to old Haida village sites. The program began with several volunteers using their own boats to travel to the sensitive sites where they would camp for the summer season. They acted as both guardians for the preservation of the site’s natural and cultural values, and they presented visitors with an introduction to Haida culture.

Today, the Haida Gwaii Watchmen Program (HGWP) has five sites in operation and employs 15 full time equivalent employees for the summer months. Longhouse-style Watchmen cabins are located at the K’uuna, T’aanuu, SGaang Gwaii, Hlk’yah and Gandll K’in Haida heritage sites. The long houses typically use composting toilets and solar powered energy systems. Each camp is staffed by up to five Watchmen, who monitor guest activities, look out for their safety and ensure that there are no more than 12 visitors on shore at one time. There are no daily limits to the sites. The visitor management strategy developed by the AMB defines an annual quota of 33,000 visitor days. These limits were created based on information from visitor surveys (normative research on the quality of the visitor experiences) and in consideration of the management plan vision to have an uncrowded wilderness experience in a unique

cultural atmosphere. The limited access to the sites guarantees a very spiritual and special experience to those who make the trip.

Visitors are issued a license and all tour operators must pay a small fee for an operating license. To avoid misuse and abuse of the sites, guidelines have been prepared for the Watchmen, tourists and tour operators as follows:

- For the Watchmen, behavioural guidelines regarding use of drugs and alcohol and hunting and fishing at the sites;
- For the visitors, a handbook which contains a code of conduct while at sensitive sites, behaviour guidelines around animal species and etiquette with respect to no trace camping; and
- For tour operators, a voluntary code of conduct covering behaviour towards wildlife and at archaeological sites, visitor safety, supporting local businesses and environmental stewardship.

The Watchmen are trained with programs in First Aid, radio operation, basic survival and Haida culture and history. Parks Canada funded a consultant to develop a comprehensive training program for the Watchmen, but this has not been implemented to date for various reasons, including funding issues.

To help encourage young Haida people to become involved and gain knowledge of the history and living culture, a Youth Watchmen Program is being considered. Family visits are encouraged as another means to involve young people.

Parks Canada enters into an annual contract with the HGWP via the Haida Tribal Society, which is the legal arm of the Council of the Haida Nation. Parks Canada provides \$323,000 annually to cover the costs for staff to live at five cultural sites during the visitor season. In addition to these funds, the HGWP receive 25 percent of the Gwaii Haanas user fees collected by Parks Canada. The staffing dates vary with the site, but all are attended to between June and September.

Development is underway for the Qay'Ilnagaay Heritage Centre as a focal point for sharing the Haida culture. The Qay Centre will house an extended museum, an interpretive centre, a teaching centre, a program management centre and a gift shop. Total capital cost is estimated at \$13 million with approximately \$7 million coming from Parks Canada.

According to Anna Gajda, the Backcountry Management Coordinator with the National Park, "the program has been quite successful at achieving protection, although there is inconsistency in enforcement of the visitation rules depending upon the individuals at the site. Visitors are generally very receptive to any direction that Watchmen provide with respect to appropriate visitation at these sites, and this willingness to listen to the Watchmen's direction certainly makes protection easier and enforcement less of an issue."

4.5.2 Wanuskewin Heritage Park, Saskatchewan

Wanuskewin Heritage Park is a unique archaeological tourism attraction located north of Saskatoon, on the edge of the prairie where the Opimahaw Creek flows into the South Saskatchewan River. Since 1984, when the site was granted Provincial Heritage Park status, this project has evolved into the Province's premier tourism attraction with as many as 70,000 visitors per year.

The archaeological significance of the site was recognized back as far as the 1930s. In 1980 Dr. Ernie Walker, the head of the department of Anthropology and Archaeology at the University of Saskatchewan and Senator Hilliard McNab, began to lobby for preservation of one of the oldest and most unique Archaeological sites in Canada. In 1982 and 1983, Dr. Walker completed a detailed assessment of the Wanuskewin area. During the course of these investigations, a total of 21 archaeological sites were identified including 19 pre-contact sites and two historic (more recent) sites. The majority of these sites were undisturbed. Intensive research began in 1984 and continues today.

The archaeological work revealed one of the most concentrated, least disturbed and most significant Plains Indians sites in North America. Northern Plains people had been using this site for various purposes for more than 8,000 years. The Nomadic Indians came to this area to celebrate, worship, hunt, gather and seek shelter from the bitter winters. Some of the key finds on the site included:

- A number of distinct buffalo kill sites;
- Several buffalo pounds for corralling;
- Several buffalo jumps (cliffs they were lured over);
- A buffalo processing site;
- Numerous nomadic camping sites; and
- A medicine wheel.

In 1986, the site was given National Historical Site status and in 1987 the Park was officially opened. In 1991, the award winning Visitor Interpretation Centre was completed. A total of \$10.5 million in funds leveraged from the private and public sectors were used to build the Interpretive Centre. The name Wanuskewin, a Cree word meaning "to seek peace of mind", is reflective of the extent to which Aboriginal involvement and spirituality guided the Park's development and programming.

The Park's mission is *"to promote and work towards establishing a world recognized heritage park that serves as a major tourist attraction and contributes to increasing public awareness and understanding of the cultural legacy of the Northern Plains Indians"*. The objective of the Park is to work cooperatively in an imaginative and culturally sensitive manner while serving as a major tourist attraction, human resource development agency and a leading scientific, cultural and educational authority. One of the goals is for the Park to become a centre for Canadian Plains Indian research.

Today the Park is comprised of the following:

- A 30,000 square foot visitor centre including an interpretive centre, exhibition centre, university research labs, native restaurant and gift shop;
- Trail system;
- 21 key archaeological sites;
- An onsite archaeology laboratory;
- On-going archaeological digs; and
- An outdoor amphitheatre.



Two Boards of Directors manage the Park. The first is composed of both native and non-native supporters overseeing the Wanuskewin Heritage Park Corporation, a charitable non-profit organization with 13 directors from the city (Saskatoon), province, federal government, university, non-profit agencies and donors. The second Board oversees the Wanuskewin Indian Heritage Incorporated (WIHI) and is comprised of 13 representatives from

the five Saskatchewan tribal nations to provide cultural and spiritual leadership. The Park manager serves both Boards.

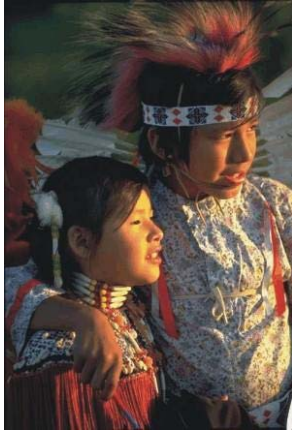
The Park employs 18 full time equivalent positions (90 percent First Nations) and 10 to 15 part time equivalent jobs. The annual operating costs for the Park, including the restaurant and gift shop, are around \$2 million.

One interesting spin-off from the Park has resulted in the Saskatoon Board of Education giving its full approval and cooperation in a venture, which enabled elementary school age children to learn the basics of working on an archaeological site. The positive impact this project has had on the individual students and on race relations within the school system further prompted the Board of Education to begin discussions on the development of new curriculum for elementary schools emphasizing the culture and traditions of Indian people before European contact.

Since the initial involvement with Dr. Walker, the Park has retained a collaborative relationship with the University of Saskatchewan in a number of fields; including archaeological research and ethnobotanical studies. All archaeological activities from approval of archaeology digs to interpretation and display of artifacts are reviewed and discussed at length with the WIHI Board.

The Interpretive Centre, trails and event programming all respect the fragility and sacredness of the property. Building development has made extensive use of local materials and spiritually inspired design elements. All aspects have links to the four seasons, four directions and four stages of life. Trails help channel visitors into specific areas to minimize disturbance to sensitive and sacred sites.

The environmental and ecological aspects of the site have been carefully considered as well. A Resource Management Plan was prepared for the site detailing biophysical and cultural resource inventories, interpretive site information, site sensitivity and development suitability analyses and landscape restorative measures. The Park retains a full time Resource Manager and staff members responsible for implementing the Resource Management Plan.



Employees at the Park conduct peer training, and financial support is provided for staff to take specialist training in hospitality and archaeology. General staff undergo an orientation process that takes three to four weeks. Front-line staff goes through an in-house 20-week course in interpretation.

4.5.3 The Cradle of Humankind, South Africa

The Cradle of Humankind World Heritage Site is perhaps one of the best examples of an archaeological attraction. Many paleontologists believe that over 40 percent of all the evidence of human evolution comes out of this valley. The area has been the subject of archaeological research for many years but it was not until apartheid was eliminated that the area became known as a tourism destination.

The park is comprised of 47,000 hectares of Bankenveld, Bushveld and Highveld littered with archaeological relics just 32 kilometres outside of Johannesburg, South Africa. Four years ago UNESCO designated the area a World Heritage Site. The richness and variety of fossilized remains of hominids and fossils of other plants, animals and pollen, their excellent preservation in caves and the age of specimens (up to 3 million years old) were the reasons for designation. The area contains sites dating to Early Stone Age, the Middle Stone Age, Late Stone Age and Early and Late Iron Age. There are at present 12 excavations including the famous Sterkfontein Caves where the 2.5 million year old skeleton (Mrs. Ples) was discovered in 1936 and Swartkrans where the first confirmed use of controlled fire took place. Some scientists estimate that only 10% of the deposits have been excavated to date. However, this is difficult to estimate, as the extent of deposits in the area is unexplored.

Following the abolishment of apartheid, the area began to gain international presence and tourists began to visit. Today in addition to the ongoing archaeological excavations and research, the area is home to a number of individually owned and run tourism attractions. Thousands of visitors every month travel to the Cradle of Humankind. The major attractions include:

- Sterkfontein Caves
- Wonder Cave
- Rhino and Lion Nature Reserve
- Brookwood Trout Farm
- Numerous tours ranging from walking tours to helicopter tours.

The area is also home to numerous private nature reserves and game farms, the oldest Gold Mine in Witwatersrand, arts and crafts outlets, small hotels, lodges, conference centres and restaurants including the famous Cradle. The site is also an area of great natural beauty and is populated by remnants of some of the great herds of game that have disappeared in most areas of South Africa. It is also an area of exceptional geological diversity and has many other sites of cultural value and interest.

Efforts to protect the area have been led by the Gauteng Department of Agriculture, Conservation, Environment, and Land Affairs (DACEL), a provincial government agency whose mission is largely to ensure sustainable management of natural resources. WITS University and the scientific community have also led efforts. WITS University owns the Sterkfontein Caves. Protection of the area and the resources within are complicated by the fact that most of the area is in private ownership (30 ranches often subdivided).

World Heritage Sites are vehicles for education, science and culture. With the designation, it was recognized that not only was scientific research important but also

there is a need to ensure public access as a means for educating people in South Africa and worldwide about science and the origin of our species.

In 2000 the master planning process began for the area. When UNESCO designated the Cradle, the project was identified as one of Gauteng Province's "Blue IQ" projects. This meant the Cradle was to become one of the 10 special projects in the province designed to maximize jobs and stimulate economic development. Balance became the keyword – between the interests of the scientific community, local landowners, government, and residents and local businesses – balance to ensure sustainability of the Cradle area and to preserve access/use by future generations. The Master Plan set out to achieve these objectives.

The Cradle is being set up with a Management Authority and a Charitable Trust. The Vision and Mission Statement are as follows:

Vision

To make the Cradle an outstanding example of land utilization and conservation in South Africa.

Mission Statement

In acknowledging the worth of the Cradle, as part of the Cradle of Humankind World Heritage Site, as well as for its own natural beauty and diversity, we dedicate ourselves to:

- Conserving the fauna and flora and all natural features within the Cradle.
- Protecting palaeontological and archaeological sites as part of the cultural heritage of South Africa.
- Achieving and maintaining a harmonious balance between the natural order and human activities.
- Developing business structures and promoting tourism for the benefit of the community of the Cradle as a whole.
- Adhering to high ethical standards at all times with regard to all activities and structures associated with the Cradle.
- Sharing all that the Cradle has to teach us and encouraging a sense of wonder through discovery and knowledge.

The Master Plan calls for the development of an Interpretive Centre as well as a Research Centre to provide the focal points for tourism and scientific research within the Park. Visitation projections made within the Master Plan run from 295,000 visitors in Year 1 to over 2 million visitors by Year 10 (domestic visitors are projected at 80 percent of these totals). The Charitable Trust will purchase several of the key sites including Swartkraans and Kromdraai and partnership agreements are being created with the private landowners.

The business model for the Cradle of Humankind World Heritage Site is based on the following principles:

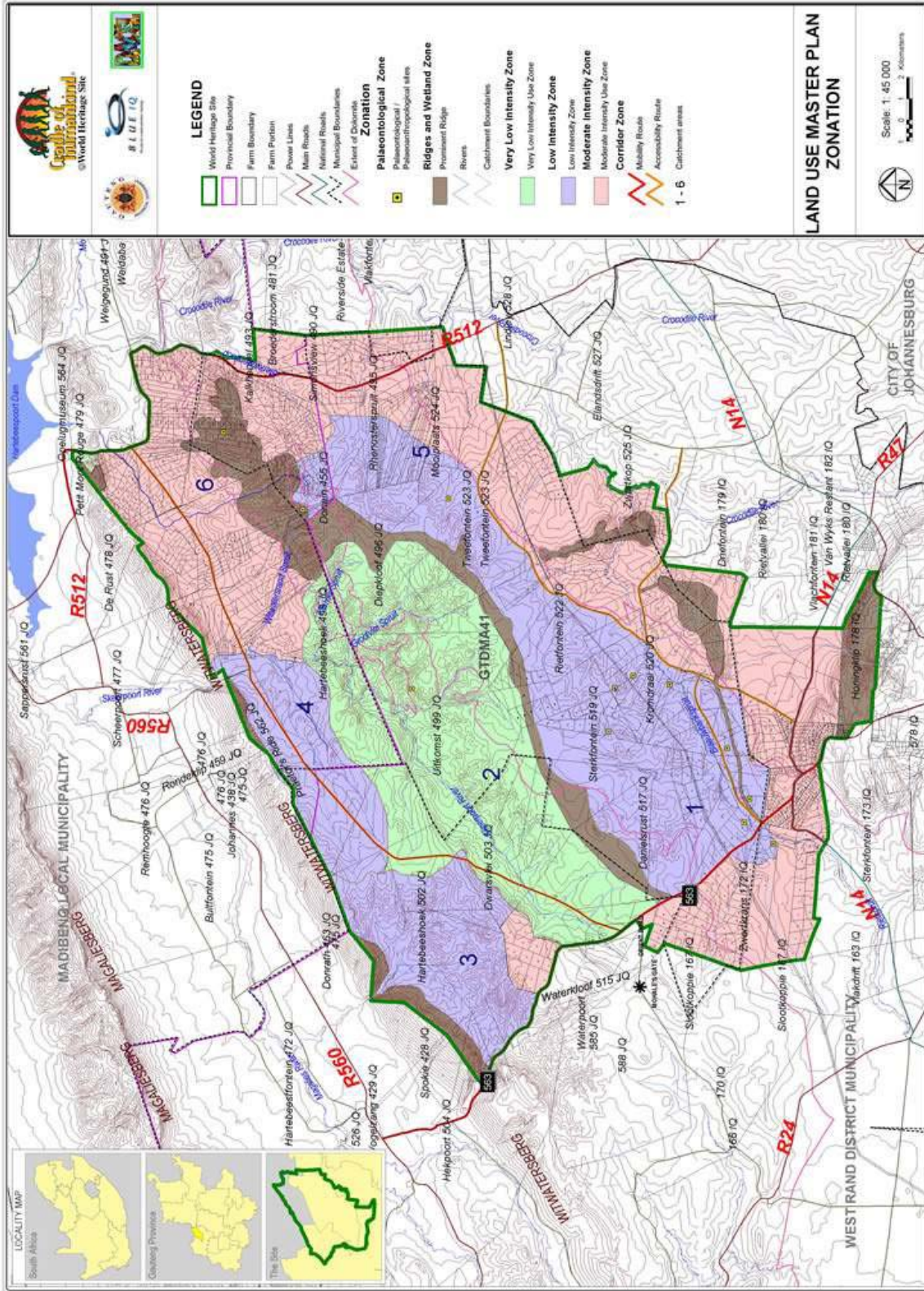
1. Sustainability – Ensuring the management of the WHS and operation of interpretive facilities is sustainable.
2. Independence from Government Subsidies – Visitor facilities must operate independent of public subsidies.

3. Economic Viability and Self-Sufficiency – tourism or other visitor facilities developed at the site should be self-sufficient over the long term.
4. Income and Financial Return – Income is needed to ensure community benefits (jobs, economic development), scientific research and conservation (ensuring private landowners are compensated for public access).

The master planning process has covered the following elements:

- Public participation
- Land use and zoning taking into account biophysical, infrastructure and socio-economic factors
- Monitoring and evaluation system
- Environmental Impact guidelines
- Tourism planning
- Public information documents and environmental guidelines including Best Environmental Practice Guidelines, Design Guidelines, Tourism Development Guidelines and Codes of Conduct for Tour Operators and Visitors
- Interpretive network with environmental conditions informing the location of interpretive facilities
- Community benefits.

This is an example of an internationally significant archaeological site (perhaps the most significant site in the world) with complex environmental sensitivities that has been properly planned for tourism as a form of economic development while protecting the sensitive resources and the ongoing activities of the scientific research community.



4.6 The Evolving Role of Tourism – Focused Downtown Areas



The previous section provided case studies of projects that linked tourism benefits with the maintenance of special heritage resources. The case studies are located in areas with a different geographic context than Carbonear. An integrated tourism strategy for Carbonear must link Carbonear Island with Downtown Carbonear. Insights on this linking are presented in this section.



Urban waterfront areas have evolved from the 1970s based often upon similar needs and the availability of funding support from senior government. Within Atlantic Canada, there is no standard approach or formula to initiate and sustain tourism activities in a downtown area. Rather, the process of planning, funding and implementing a downtown tourism strategy is dependent upon:

- Responding to a specific need such as the closure of the fishery, changing market forces that have resulted in economic decline or availability of government funds.
- Local community interests and the local government reaching an agreement on the plan of action.
- Commitments from the participants to support the selected plan as it is implemented.



There is no available research that documents the changing needs of urban tourism areas in Atlantic Canada that can be applied to Carbonear. Faced with this limitation, the consultants reviewed their experience on similar work since the 1970s. This review determined that historic urban areas have been renewed or preserved by often moving through four different stages of planning and development. These stages can be called: meeting basic needs, economic base adjustment, economic base growth and partnering.



Meeting Basic Needs - For many heritage or downtown tourism areas in Atlantic Canada, the first stage occurred in the late 1960s to mid 1970s. During this period, the Federal Government, through the Ministry of State for Urban Affairs and other initiatives, was the major funding source for urban renewal programs to improve the condition of housing and infrastructure in downtown and historic areas. The Neighbourhood Improvement Program (NIP) was one of these initiatives that assisted many homeowners in the historic neighbourhoods to upgrade their premises.



Economic Base Adjustment - By the mid 1970s, urban renewal programs shifted away from resolving housing and public health issues to addressing the decline of economic base conditions. This shift ushered in the second stage. The rapid development of suburban shopping centres and changing consumer tastes had resulted in the

economic decline of downtowns. Two general approaches were followed. Provinces such as Nova Scotia and Saskatchewan set up “Mainstreet Programs” where cost-sharing on tourist and customer-focused improvements (consolidated off street parking, building facades, etc.) was provided if:

- A business improvement district was defined;
- The local business community and residents could agree on a strategy;
- The local council approved the strategy; and
- A small tax levy was applied to local businesses to pay for a portion of the costs.

Implementation of these Mainstreet Programs was then coordinated by a committee of council, a downtown commission or a downtown corporation (often with expropriation powers). Lunenburg, Nova Scotia was a major beneficiary of the non-profit Mainstreet Program initiative. Important architectural studies and surveys were conducted and, in part, led to the recognition of Old Town Lunenburg as a UNESCO World Heritage Site in 1995. The result has been significant tourist benefits.

The other approach, which was followed in Ontario, Prince Edward Island and New Brunswick, focused on downtown anchor projects. The intent of this approach was to find a developer who would build a major downtown anchor project to compete with increasingly popular suburban malls. Market Square in Saint John and the Confederation Court Mall in Charlottetown are examples of this approach. Both of these anchor projects are major tourism draws.

In hindsight, it is the consultant’s opinion that the community economic development approach has provided the broadest base of lasting social, economic and tourism/heritage/preservation benefits at an overall lower cost.

Economic Base Growth - With improved housing and a rejuvenated tourism and retail base, many communities evolved into the third stage. This stage focused on the hiring of coordinators for community or downtown marketing and the programming of special events or attractions. A key focus of these initiatives was the tourist market. Many of these programs, especially in the Maritimes, focused on “bringing back the waterfront” for both residents and visitors. Many communities now have very busy summertime waterfront programs each year, often coordinated with a provincial museum.

Partnering - Many communities remain in the third stage. However, those communities that are pursuing new projects are increasingly relying upon partnerships with senior government, non-profit groups and the private sector. This stage has also seen land use controls shift from minimum standards to quality standards (or guidelines) and a focus on mixed-use projects that often include housing. Once again, the intent of these efforts is to bring life, vitality and economic strength back to traditional downtown areas. In major cities, such organizations as the Charlottetown Area Development Corporation (CADC) and the Halifax-Dartmouth Waterfront Development Corporation (WDC) have broad mandates for partnering to facilitate tourism or other development projects.

4.7 Product - Market Match

The primary market for the strategy will be heritage/culture. The product-market match refines and expands this conclusion to identify those markets with the best potential in both the short and long-term. The consultants also developed a number of evaluation criteria to determine the fit or match. The criteria are:

- Size of Market – Based on the participation rate in the activity, the absolute size of the market, the role of the activity as a trip motivator.
- Accessibility of the Market – The ease with which one is able to target the market and the potential cost-effectiveness to target the market.
- Market Trends – The degree of current and future growth likely in the market, and the degree to which the market is “on trend”.
- Competitive Position – The local area’s competitive position with respect to the market.
- Potential Yield – Based on average expenditure per trip for the market.
- Seasonality – Ability to extend a season.
- Current Situation – Identifying the products that are market-ready and the markets that are already visiting the local area.

The following exhibit (4.1) provides a comparative evaluation of “potential” opportunities against the criteria identified above. The opportunities that were investigated in the product-market match were:

- Culture and Heritage
- Learning
- Kayaking/Canoeing
- Nature-based
- Motorcoach
- RV.

Some of these markets, such as motorcoach and RV, will come to the Carbonear area because of its location on touring routes from St. John’s.

Exhibit 4.1 Market Evaluation Chart		
Criteria/Market	Learning	Culture & Heritage
Size/Yield		
<ul style="list-style-type: none"> Size of export opportunity 	<ul style="list-style-type: none"> - 325,000 with Elderhostel - 100,000 with Smithsonian - over 700,000 Source: Canadian Ed-Ventures Learning Vacations in Canada, 2001	<ul style="list-style-type: none"> - 4 million Cdn - 7.7 million Japanese - 5 million European Source: CTC Pleasure Travel Market Series
<ul style="list-style-type: none"> TAMS data Source: Travel Activities and Motivation Survey; Overview Report, 2001	3% of N Americans took educational package in past few years (4% for adventure and 6% for motorcoach)	33% will versus 28% that did (historical sites)
<ul style="list-style-type: none"> Typical expenditure per trip 	Up to \$3,000 for 10-12 days (\$300 – \$400 /day) Source: Review of company brochures and web sites	\$2,000 – 2,500 for 14 – 21 days (\$120 – 160/day) Source: US National Trust for Historic Preservation
<ul style="list-style-type: none"> Estimated Proportion of expenditure in Carbonear 	Medium	High propensity to shop (59% vs. 39% for avg. tourist)
<ul style="list-style-type: none"> Local job opportunity 	Moderate	High
Accessibility of Market		
<ul style="list-style-type: none"> Ease to target 	High through operators and affinity groups	High
<ul style="list-style-type: none"> Potential intermediaries 	High	Lots of operators
<ul style="list-style-type: none"> 'Below the line' marketing potential 	Work through operators and affinity groups	Specialized operators
Market Trends		
<ul style="list-style-type: none"> On trend 	High	High
<ul style="list-style-type: none"> Growth potential 	High	High growth market with aging population
<ul style="list-style-type: none"> Fit with provincial strategy 	Good	As part of sightseeing/touring
Competitive Position		
<ul style="list-style-type: none"> Market awareness 	Low	Overall low but niche is high
<ul style="list-style-type: none"> Perceived appeal of Carbonear experience 	Wide range of cultural / heritage products - undeveloped	Some retail, accommodation and programming gaps
<ul style="list-style-type: none"> Uniqueness in marketplace 	High	High with Early European Settlement themes
Seasonality		
<ul style="list-style-type: none"> Shoulder season potential 	Moderate	Some fall

Market Evaluation Chart (continued)

Criteria	Kayaking/Canoeing	Nature-based
Size/Yield		
<ul style="list-style-type: none"> Size of export opportunity 	3.5 million Cdn Source: Print Measurement Bureau, 1991 14.6 million US (1.4 million kayakers) Source: 1994/95 National Survey on Recreation and the Environment 13% of US & Can travellers in recent past went canoeing or kayaking Source: TAMS Overview Report, 2001	23.7 million US watching wildlife (22.9 observing, 12.0 photographing, 10.0 feeding – 32% out-of-state) Source: 1996 National Survey of Hunting, Fishing, and Wildlife-Associated Recreation 14% of US & Can travellers in past 2 years went bird watching Source: TAMS Overview Report, 2001
<ul style="list-style-type: none"> TAMS data 	20% will/14% have	Numerous
<ul style="list-style-type: none"> Typical expenditure per trip 	US adventure travellers spend \$2,500 – \$4,200/person (\$500 per day) Source: “Adventure Tourism” in the Encyclopedia of Emerging Industries, Gale Publishing, 1998	Same
<ul style="list-style-type: none"> Proportion of expenditure in Carbonear 	Moderate	Moderate
<ul style="list-style-type: none"> Local job opportunity 	Moderate for guides	Moderate
Accessibility of Market		
<ul style="list-style-type: none"> Ease to target 		
<ul style="list-style-type: none"> Potential intermediaries - i.e. tour operators 	High	High - Rendezvous interest for wildlife viewing
<ul style="list-style-type: none"> ‘Below the line’ marketing potential 	High - through shops and operators	Moderate - through affinity groups and retail
Market Trends		
<ul style="list-style-type: none"> On trend 	Moderate	High
<ul style="list-style-type: none"> Growth potential 	Moderate	High
<ul style="list-style-type: none"> Fit with provincial strategy 	Adventure is key segment	Nature viewing is a key segment
Competitive Position		
<ul style="list-style-type: none"> Market awareness 	Low	Low
<ul style="list-style-type: none"> Perceived appeal of Carbonear experience 	Lack of branding and infrastructure	Lack of branding and infrastructure (especially to Island)
<ul style="list-style-type: none"> Uniqueness in marketplace 	Moderate	High for Island
Seasonality		
<ul style="list-style-type: none"> Shoulder season potential 	Low	Low

Market Evaluation Chart (continued)

Criteria	Motorcoach	RV
Size/Yield		
▪ Size of export opportunity	25 million passengers (1996) Source: Motorcoach Census 2000,	1 in 10 vehicle owning households in US 9.3 million RV's in US 600,000 in Canada Source: Recreational Vehicle Industries Association, 2001
▪ TAMS data	5% Cdns and 6% US have in past two years	
▪ Typical expenditure per trip	US\$5,000 to \$7,000 per day per coach Source: American Bus Association	\$150 per day (1997) Source: Recreational Vehicle Industries Association, 2001
▪ Proportion of expenditure in Carbonear	Low per person	Moderate
▪ Local job opportunity	Supplemental income	Potential in RV campgrounds
Accessibility of Market		
▪ Ease to target	High	High
▪ Potential intermediaries - i.e. tour operators	Tour operators	Few
▪ 'Below the line' marketing potential	Through operators	Moderate through RV dealers and other campgrounds
Market Trends		
▪ On trend	Moderate	Moderate
▪ Growth potential	Modest	Strong
▪ Fit with provincial strategy	Good	Good
Competitive Position		
Market awareness	Low for destination	Low
▪ Perceived appeal of Carbonear experience	Specialty Retail, Washroom and Food Stop	Often limited fit with heritage/cultural focus
▪ Uniqueness in marketplace	High for a small segment	Moderate for a small segment
Seasonality		
▪ Shoulder season potential	Medium	Medium

V Implementation Strategy

5.1 Introduction

The purpose of this section is to present the recommended Action Plans to implement the strategy. Each Action Plan adheres to the recommended vision, strategic objectives and action plan themes outlined in Section 2.3. The Action Plans contain discussions on responsibility, implementation elements and funding.

The report concludes that Carbonear’s tourism product potential is best pursued by:

- Focusing on the cultural and heritage market segment.
- Providing Carbonear Island programming that protects the sensitive environment.
- Initiating a physical upgrade program in the downtown.
- Implementing a signage, image and identity program that “brands” the Town and Carbonear Island in the context of the Baccalieu Trail.
- Rolling out a marketing plan that targets priority markets and involves partnerships with such groups as the Baccalieu Trail Tourism Association (BTTA) and the Department of Tourism, Culture and Recreation.
- Containing a management and organization structure within the Town of Carbonear that facilitates active participation by key partner organizations and volunteers.

The benefits of the Action Plans must include positive economic spin-offs. Using the 1997 exit surveys and applying inflation factors (consumer price index from 1997 to mid 2004) determines the typical daily sales for visitors. In \$2004, the average daily expenditure for non-resident auto visitors is \$47.75. Those visitors entering the Province by air have a higher overall daily expenditure at \$70.20. More detailed analysis of these expenditures from the 1997 exist surveys, with adjustments for inflation to 2004, provides the daily expenditure profiles presented in Exhibit 5.1. As this exhibit reveals, every visitor to the Carbonear area and the Baccalieu Trail will spend \$62.35 per day (overnight included) or \$45.30 (less accommodation).

Exhibit 5.1			
Estimated (\$2004) Per Day Tourism Expenditures (Less Auto-Related)			
Expenditure Type	Auto Visitors (35%)	Air Visitors (65%)	“Typical” Visitor
Auto Related	\$16.40	\$10.55	\$12.60
Accommodation	\$8.80	\$21.50	\$17.05
Restaurants	\$8.35	\$18.15	\$14.70
Groceries	\$4.35	\$4.25	\$4.30
Souvenirs and Crafts	\$4.45	\$7.40	\$6.35
Entertainment & Recreation	\$2.65	\$3.25	\$3.05
Other	\$2.75	\$5.10	\$4.30
Total	\$47.75	\$70.20	\$62.35
<i>Source: Adopted from the 1997 Auto and Air Exist Survey, Department of Tourism, Culture and Recreation. Inflation adjustment based upon national CPI from May 1997 (107.5) to May 2004 (125.0) not seasonally adjusted. Auto and visitor percentage distribution based on 1994 to 2003 averages.</i>			

5.2 Town Related Upgrades Action Plan

Guiding Principals

A key objective of the recommended physical improvements is the continued long-term development of the downtown waterfront as a quality tourism destination and place of interest and vitality for the community-at-large.

There are many examples of good waterfront development projects in Atlantic Canada, among which Carbonear would rate very highly with the recommended upgrades. In 1999, the Waterfront Centre, an international organization of municipalities that feature waterfront development and enhancement areas, prepared an “Urban Waterfront Manifesto”⁵. This manifesto is an approach to the planning and development of waterfront areas that avoids trends with the result being appropriate design solutions. The philosophy expressed in the manifesto is to recognize the inherent public interest in waterfronts, which is reflected in public access and ownership of the water itself. The manifesto outlines several related planning fundamentals, which can be summarized as follows:

- Think long-range, comprehensively and holistically.
- Ensure that there is meaningful community involvement in the planning process.
- Recognize that waterfront planning is a blending of economic development, design, and environmental considerations. One consideration should not exclude another.
- Think long-term (10, 15 or 25 years). Development over time allows a greater richness of character than a one-time approach (which tends towards sameness).
- Remember that the waterfront is part of an inland watershed consisting of creeks, rivers and bays.

The Manifesto also includes these key development principles:

- The best undertakings involve a partnership between the private sector, public entities and residents.
- Welcoming public access to and along the waterfront should be the hallmark of all projects. Visual access to the water (referred to as view corridors and view planes) should be a key objective.
- Waterfront concepts and projects should flow from the local setting and embody its essential spirit. In this regard, projects should distinguish between learning from good examples (preferred) and blindly copying them (avoid).
- Provide a diversity of uses along the waterfront. People of all income levels and cultures should feel welcome, and nighttime activities can be provided as well as daytime.
- Distinctive places for children as well as the elderly should ideally be included.
- Waterfronts present special opportunities for interpretation and education of natural values, community history and culture, including notably the commercial and residential activities that often preceded today's developments.
- Preserving and interpreting the tangible aspects of an area's history provides character and meaning to waterfront development.

⁵ See the Waterfront Centre's website at <http://www.waterfrontcenter.org/manifesto.html>

- The tendency to clean up waterfronts should be approached carefully so that rich underlying values are not unnecessarily sacrificed.
- Public art should be encouraged and the active participation of the local arts community should be sought to ensure that artists' special way of seeing things are incorporated.

In preparing this Action Plan, the consultants utilized these points. The Town of Carbonear is welcome to embrace and become a signatory to the manifesto.

The Projects

The strategy takes a proactive approach to managing change. It focuses on those projects that will enhance the overall visitor, investor and business appeal of the downtown waterfront area, while minimizing adverse impacts on current businesses and activities. It also seeks an environmentally sensitive and sustainable approach to infrastructure, services and programming on Carbonear Island. With few exceptions, the necessary infrastructure is in place to permit an improved level of services and amenities in the downtown waterfront area. The primary challenge is to create a positive environment for managed change that results in economic benefits and enhances the special character and heritage of the waterfront. In this context, this Action Plan focuses on:

- The recognition of past investments that have been made over the years, including the construction of the boardwalk along Carbonear Harbour, the Conception Bay Regional Community Centre, the Railway Station and Museum.
- The need to create awareness of parking opportunities in and adjacent to the downtown waterfront, as well as new visitor parking facilities to create a positive environment for business and tourism activities.
- The need for the downtown waterfront to be accessible to residents and visitors and an exciting and vital place to which to return again and again.
- The opportunity for the waterfront to be a gathering place for visitors and residents, and a staging area for vessels going to Carbonear Island.

The recommendations of this Action Plan are shown in the following exhibits. There are three projects, identified as follows:

- Project 1: A Parking Program - This project will provide for more coordinated on-street and off-street parking.
- Project 2: Pedestrian Circulation - This project involves upgrades or extensions to sidewalks.
- Project 3: Public Spaces - This project involves an expanded sidewalk in front of the War Memorial, a new Plaza (corner of Water and Adelaide Streets) that contains a compass motif set into the plaza pavers and a rest area, and a "vest pocket" park adjacent to the Old Post Office (corner of Water Street and Musgrave Street).

The projects are described in the pages that follow.

Project 1 Parking Program

This project addresses the needs of motorized travel and the requirement for adequate public parking to serve the downtown waterfront area. As they do at present, most future visitors will continue to arrive by cars or tour bus. Therefore, it is essential that adequate parking facilities be provided. This is necessary for both safety and to minimize inconvenience to residents.

Public Parking

Public attractions and staging areas require adequate parking within a reasonable walking distance from the principal attractions (including the proposed seasonal wharf/staging area for Carbonear Island). If this parking cannot be provided, alternate means of bringing people to the area may be required. This typically includes solutions involving shuttles (such as those at Fortress of Louisbourg National Historic Site in Nova Scotia). As these services can be costly to fund and operate, and are usually associated with an admission fee, they are not necessary for Carbonear.

The Action Plan focuses on maximizing existing parking opportunities and providing good signage (see Section 5.4) and other information to lead visitors to additional preferred parking areas nearby. The attached exhibits show the recommended locations.

The most important factor to consider when choosing a site for a parking area is availability of land. The purpose of parking is to provide reasonably quick access to the principal attraction (such as the proposed seasonal wharf/staging area to Carbonear Island beside Rorke Stores) and related points of interest. Ownership of the land utilized for public parking should preferably be publicly owned or, if private, have proper authorization for public use, for legal and liability reasons. The lot entrance should be easily identifiable, and the lot should be relatively flat. The site must also provide good natural drainage and require little grading and earthwork.

Standards for Parking Areas

Off-street parking areas can contain as few as eight to 10 parking spaces. The optional designated off-street parking area can meet this requirement and should also contain a space suitable for two or more recreational vehicles. These spaces should be 15 metres long and 3 metres wide. An additional 15 metres is required to manoeuvre the larger vehicles. Car spaces in the parking lots should be 5.5 metres long and 3.0 metres wide and the manoeuvring space should be approximately 7.0 metres.

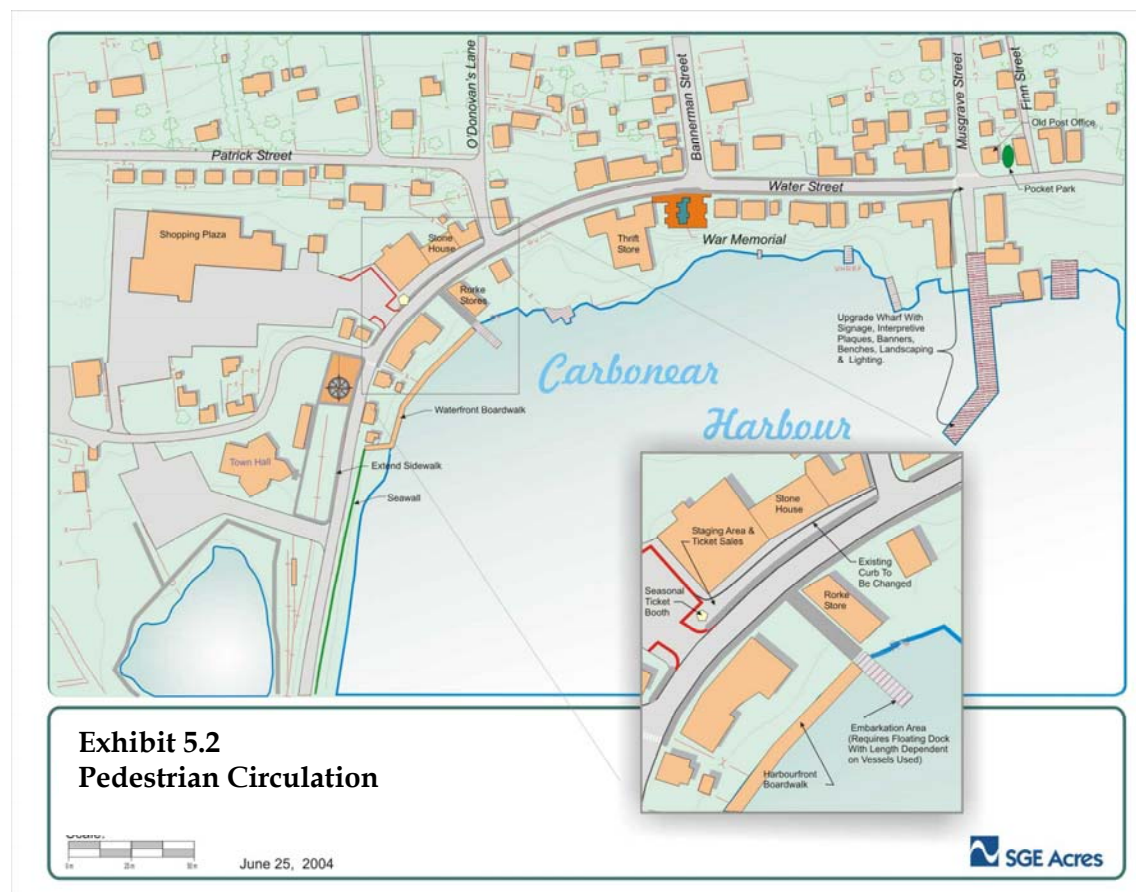
Sidewalks or well-marked pathways leading to the sidewalks or principal attraction must be provided. Parking sites should be paved and properly marked, but they may be gravelled if necessary.

Facilities for tour buses and private motor coaches also need to be provided, especially as there will be marketing efforts made to encourage longer stays in the downtown waterfront area as organized tours go to Carbonear Island (with step on guides). It is recommended that two spaces along Water Street between the Town Hall and O'Donovan's Lane be designated for buses in the peak summer tourist season. Typical coach parking spaces are 12 metres long by 3.5 metres wide. Thus, removing five to six car spaces would create two bus spaces. Additional spaces may be required in the future.

In addition to adequate parking, it is recommended that public washroom facilities be available and clearly identified. Waste receptacles should be provided near to the parking areas and throughout the downtown waterfront area. A regular program of garbage and litter pick-up should also be conducted.

Project 2 Pedestrian Circulation

It is recommended that sidewalk upgrades be carried out between the Town Hall and Musgrave Street. These upgrades should include a waterfront walk as shown in exhibit 5.2. A key objective of the pedestrian circulation upgrades is to have a consistent design (sidewalk, curb and gutter) for the street that increases walking safety, clearly defines surfaces for pedestrians and vehicles, and enhances the overall image and appeal of the downtown waterfront.



Special Facilities

As many parts of the downtown waterfront as possible should be made accessible to the handicapped and the elderly. Parking areas, entertainment venues, scenic lookouts and so forth should be equipped with smooth paths and easy grades to enable wheelchair access. Public buildings and washrooms should also be accessible.

Project 3 Public Spaces

In 2004, the Town of Carbonear does not have a tourism anchor project. An objective of the strategy is to make Carbonear Island an anchor project with the downtown functioning as both the staging area for the Island and gateway to the surrounding part of the Baccalieu Trail. In this setting, it is important that visitors to Carbonear have special experiences while in the community. In support of the main experiential feature of the waterfront, additional elements are required. The current setting has some excellent supporting attractions including the Conception Bay Regional Community Centre, the Railway Station and Museum. However, there are no destination retail operations and memorable public spaces are lacking. To enhance the visitor experience, it is recommended that the sidewalk in front of the War Memorial be expanded. A new Plaza that contains a compass motif set into the plaza pavers and a rest area be constructed at the corner of Water and Adelaide Streets. The proposed plaza will be a defining location along the waterfront and will be a natural meeting point for visitors, organized tours and special events. As a special events plaza, it is ideal for performances and a seasonal fabric structure could be used to assist in animation as well as protection from inclement weather. It will also assist in the launch of the strategy's implementation as defined by a repositioning (rebranding) of the Town and Carbonear Island.

It is also recommended that the sidewalk across from the embarkation site be widened and the access to the parking space in front of Powell's Supermarket be reconfigured. This will allow for the construction of a seasonal ticket booth and some additional space for a staging area. In addition a "vest pocket" park should be developed adjacent to the Old Post Office (corner of Water and Musgrave Streets) as a secondary public space, and public art should be included around the War Memorial.

The Town of Carbonear will be responsible for the implementation of this action plan.

5.2.1 Tourist Expenditures and Expanding the Retail Base

The staging area for Carbonear Island tourism-related programming will be Downtown Carbonear. Investigating the potential to expand the retail base of Downtown Carbonear is a requirement of the strategy. An effective approach is to prepare an investment prospectus that will assist potential operators to make informed business decisions. As the foundation of this prospectus, the following exhibit presents the results of the consultant's assessment of businesses that could be considered by investors or operators in Downtown Carbonear. Some of these businesses have operated in the Town, and the consultants are not recommending any or all of these businesses for inclusion in the future development of the study area. Rather, the assessment is included to assist potential investors and operators to make informed economic viability decisions. Ten operations were selected for the assessment based upon accepted definitions used by lenders. They are:

- "Country" General Store
- Variety Store
- Gift, Novelty and Souvenir Store
- Second-Hand Goods

- Hardware
- Retail Nurseries, Lawn and Garden Supplies
- Meat and Fish Market
- Bakery
- Specialty Clothing
- Bookstore.

Several viability indicators were selected for the assessment based upon typical small operation sales performance for 2000 (pre September 2001). If existing or new businesses cannot operate within the sector norms illustrated in exhibit 5.1, then economic viability is questionable and two options should be considered. One option is to improve the balance sheet by injecting more equity into the business. The other option is to seek outside support to reduce operating expenses. As the indicators suggest, businesses like a second-hand store, country general store and gift store offer the greatest profitability. Of these three operations, a “character” or destination country general store with a mix of product lines that focuses on a price-directed strategy for the heritage / cultural sector is preferred. For example, a Country General Store with net sales of \$1 million was selected as an example. This level of sales should require cost of goods sold at 46.2 percent or \$462,000. Operating expenses will be 39 percent or \$390,000. These expenses must cover the cost of the building (rent or mortgage), employees’ wages and benefits and general administration. With these costs, profit before taxes should be 5.9 percent or \$59,000. A key factor that will impact on any operation’s viability is operating expense. If the cost of space and employees exceeds gross profit, then viability cannot be achieved.

Exhibit 5.3 Viability Indicators (Estimates Based Upon 2000 Industry Norms)										
Indicators (%)	Business Type									
	Country General Store	Variety	Gift	Second Hand	Hardware	Nursery, Lawn & Garden	Meat & Fish	Bakery	Specialty Clothing	Book
Income										
Net Sales	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Gross Profit	46.2	40.6	46.0	50.7	37.6	48.8	35.2	60.9	44.9	42.6
Operating Expenses	39.0	37.4	38.9	44.8	35.7	43.8	31.9	56.3	39.6	41.0
Operating Profit	7.3	3.2	7.1	5.9	1.9	5.0	3.3	4.6	5.4	1.6
Other Expenses (Net)	1.3	1.9	1.5	-4.1	0.8	3.5	-0.1	2.6	3.0	2.6
Profit Before Taxes	5.9	1.3	5.7	10.1	1.0	1.5	3.3	2.0	2.4	-1.0
<i>Source: Estimates based upon lender approaches to viability and risk management assessment as detailed by such reference sources as the Risk Management Association.</i>										

5.3 Island Infrastructure & Site Services Action Plan

Taking into account the offshore setting of Carbonear Island and its cultural and natural history, it is evident that in order to facilitate tourist visitation certain on-site facilities and infrastructure will be essential. Initially, this should involve construction of a fixed docking facility (or a floating platform), sufficient in size and strength to withstand the force of the sea and provide an adequate and safe landing for tour boats and visitors. Removable information panels describing the resources of the Island and any government regulatory requirements as regards protection and/or avoidance measures could be situated on the dock. Once on land, a stairway from the dock to the top of the Island (possibly with several landings) must be included in any development strategy. Other infrastructure on the Island could include a walking trail or trails, with information panels situated at key sites or points of interest, such as the eighteenth century military barracks, storehouse and magazine and gun batteries. At such locations, minimal and strategic earth removal and landscaping to highlight existing remains could make for an effective, yet low-impact interpretation. Given the environmental concerns as they relate to the migratory bird population, as well as health and safety issues in general, a predetermined route for visitors may be the preferred option. As for other infrastructure, discussions with personnel from the Department of Tourism, Culture and Recreation suggests that construction of a facility, such as a small staging area or theatre for plays and associated cultural events, may not be feasible or cost-effective at this point,

particularly given the anticipated costs and the potential competition it may create with the theatre already in place in Carbonear. Depending on the level of interest expressed in visiting the Island, such additional infrastructure could be considered at a later date and implemented in a phased development approach.

It is also recommended that if development of Carbonear Island proceeds, a comprehensive site mapping and targeted archaeological sampling project aimed at compiling an accurate record of the resource and the overall nature and extent of the occupation be completed in conjunction with project planning and prior to implementation. This would enhance and supplement the existing historical information on the Island and help facilitate an accurate and all-inclusive interpretative strategy for the visiting public. It should be kept in mind that no physical evidence conclusively associated with the French attacks of 1696/7 has been identified to date. Locating and incorporating such remains (and any prehistoric materials that may be present) into any interpretative strategy would be critical. As well, the Provincial Archaeology Office under the terms and conditions of the Government of Newfoundland and Labrador Historic Resources Act may require an archaeological survey/assessment of the Island.

The additional benefits of adopting an approach of archaeological survey, followed by site development, would be multifaceted and ensure:

- The elimination or reduction of any unnecessary impacts to historic resources and migratory bird populations.
- That funding requirements for any subsequent research and site maintenance are kept at a minimum.
- Visitors experience the many aspects of Carbonear Island's cultural and natural history in a cost-effective, responsible and sustainable manner.

5.4 Signage, Image and Identity Action Plan

The following are objectives for the recommended image and the look and feel of the downtown waterfront area.

Image

The recommended tourism image for Carbonear and Carbonear Island complements the Baccalieu Trail Tourism Association image. The result is a traditional image that represents sustainable interest and marketability to the tourist sector. The image is in keeping with the vision for Carbonear Island as an anchor project for the Baccalieu Trail that focuses on the heritage/cultural market.

As an Action Plan, the basic requirement is for the Town and partners to review and adopt the guidelines generally as contained below. It is recommended that the physical and signage design guidelines be considered by the Town of Carbonear for possible inclusion in the Municipal Plan and Development Regulations under the *Urban and Rural Planning Act, 2000*.

Graphical Design Approach

A suggested logo and recommended applications have been prepared. The logo could also be used on clothing and other products. It is based on an artistic interpretation of Carbonear Island with a setting sun. The phrase "Historic Carbonear" is above the Island image. The new logo represents a more refined image for the Town of Carbonear for the heritage/cultural tourism market. Overall, the image implies quality (linked to the historic past) in keeping with the overall image intended for the waterfront and Carbonear Island.

It is recommended that the new logo be rolled out with an announcement associated with the acceptance of the strategy, with the message that the next decade represents a new phase for the Town of Carbonear, a decade that will see managed access to Carbonear Island and tourism numbers increase as a result.

The new logo should be registered to protect copyright. The estimated cost is \$2,500.



Physical Design Approach

The intent of an overall design approach, or Design Guidelines, is to ensure that the downtown waterfront's special natural and heritage assets are enhanced as development and change proceeds. Secondly, they should be used to ensure that new or renovated buildings are compatible with neighbouring structures, reflect a Newfoundland historical theme, and that there becomes a continuity of streetscapes. More specifically, the guidelines should seek to:

- Develop a thematic continuity along Water Street.
- Maintain views and vistas of Carbonear Bay and Carbonear Island.
- Take advantage of the southern orientation for sun and views.
- Extend and enhance open spaces and activity areas on the waterfront.
- Retain the water's edge as a public space.
- Affirm and refine signage and building standards.
- Enhance landmarks and points of interest.
- Require design approval for new projects.

The following are recommended general urban design guidelines for the Carbonear Downtown Waterfront. These are recommended as a means to advance the overall built environment especially along Water Street and the streets that connect to the existing downtown. These guidelines should be considered by the Town of Carbonear for inclusion in the Municipal Plan and Development Regulations. The recommended urban guidelines are detailed in the remainder of this section. The estimated cost of implementing these guidelines is assumed to be included in the current Town operating budget.

Newfoundland Maritime Historical Theme

Ideally, the term "historical theme" should be incorporated into the Municipal Planning and Development Regulations under the heading "Special Requirements Building Appearance". In 2004, there is no building in the downtown waterfront that has established the standard to which other structures should aspire. It is not expected that new or renovated structures be traditional post and beam construction but they should have the scale, texture and design features that are typical of Newfoundland Maritime historical features. Other models could include the historic stone structures on Water Street. While it is not intended that new construction 'ape' the older stone construction and styles, lessons can be learned in terms of setback, massing and architectural detailing.

Maintain Views and Vistas of Carbonear Bay and Carbonear Island

Carbonear Harbour is a community resource. It has traditionally been the route by which fishing vessels traveled out to sea, and by which commercial and pleasure vessels navigated. In addition, it was and remains a working waterfront with the focus being the Government Wharf at the base of Musgrave Street. No developments should be contemplated that fully restrict the general view to the bay (and Carbonear Island) from developed areas. New development should be located away from the harbour's edge and take advantage of vistas not currently being enjoyed by others. Where developments are contemplated at the water's edge, they must be low enough so as to not obscure views from those inland of the development, and public access to the water

side of any new development should ideally be maintained. Commercial uses such as windowed restaurants are examples of the types of use that would meet this criterion.

Use Traditional Materials in New Construction and for Renovations

The use of stone or wood siding is preferred for all existing or new structures (except for existing masonry or concrete structures that already exist). As renovations are undertaken, property owners should be encouraged to use wood materials. As the use of colourful paints is common to Newfoundland Maritime historical architecture, no restriction on colours should apply, although reason should govern the selection of colours. Informational and commercial signage is addressed below.

Signage

A signage and information system should be adopted for the Carbonear Downtown Waterfront area that provides a distinctive identity and serves to inform both local residents and visitors. It should be based on the logo discussed above. Design guidelines should be established which would assist local businesses in the selection and manufacture of quality signage for their place of business and which together would enhance the overall community appearance.

Information Signage

There are significant opportunities to improve information signage into and within the downtown waterfront area. The following would be the essential components of an informational signage program:

- Directional signage that leads visitors to the downtown waterfront and to parking areas.
- A new "Welcome" sign for the entry points to Carbonear.
- Parking signs indicating direction to public parking lots.
- Street kiosks for public notices and events.
- Graphics to include a logo, stationery, promotions, and possibly labelling (package) identification.

The estimated cost is \$15,000 in Year 1 and then ongoing maintenance/new sign costs of \$3,000 per year.

As an Action Plan, an overall Logo and Media Communications Program should be undertaken. This should include:

- Adopting new standards under the Municipal Plan and Development Regulations.
- Preparing a Historic Self-Guiding Map that incorporates the waterfront and surrounding downtown area.
- Preparing an Informational Map of Carbonear Island to inform visitors (and residents) about the Island's heritage, unique natural settings and plans for future access.

The tasks associated with new standards are internal to Town operations. Other parts of the program should be undertaken with the BTTA with input from the Department of

Tourism, Culture and Recreation. The estimated cost is \$5,000 for initial design and \$2,000 per year for production.

Commercial Signage

The following are design considerations for commercial business signage. These include a review of existing signage and recommendations for improvement where applicable; and secondly, guidelines for new signage.

Existing Signage

In 2004, the use of signage by businesses and other facilities in the downtown waterfront area varied considerably. Overall, businesses have not devoted much effort or investment into their signage programs. This is one area where a relatively small investment can be a benefit both to individual businesses and the general community through the introduction of more pleasing and colourful elements to the streetscape. As a result, the Town may wish to provide assistance to business owners to upgrade their signage, if need is shown. This assistance should be pursued with the BTTA and M-RON to identify the preferred funding sources.

Theme

It is recommended that new signs reflect the historical Newfoundland Maritime heritage of Carbonear.

Layout and Spacing Principles

Attractiveness and legibility are functions of the layout and spacing principles applied to the sign design. A good designer will tend to use these principles as a matter of course.



- Give careful consideration to the message - don't say too much or too little. No one wants to read a cluttered sign. Often the name and type of the business is sufficient. See examples at left.
- For letters to be readable from a distance, use the general rule of 1 inch high for every 50 feet away.
- Letters should appear to be spaced evenly, even if they are not (technically, this is called kerning).
- Signs can be made to look old fashioned by laying out some words in a curve, or by using certain ornamental typefaces such as Algerian or Bodoni.
- Margins determine how spacious or crowded the sign will appear. For balance, margins should be the same on left and right sides, and the bottom margin should be slightly taller than the top.

Lettering Type

Lettering should be of the serif type (i.e., **this** not this). Examples:

ABCDEFGHIJK
efghijklmnopqr

Within the serif typeface, older styles are preferred over new ones, but legibility is preferred overall. The overall intent is to not use highly complex letter types.

Colour

For sign backgrounds, use colours that reflect the Newfoundland Maritime heritage of Carbonear: muted blues, blue-greys and greens, and dark reds are appropriate. White is acceptable, but pastels and bright colours (such as Day-Glo) should be avoided. Lettering can be brighter and of contrasting intensities to the backgrounds, but again, avoid modern paints and colours such as Day-Glo. Gold leaf and silver may be used, but avoid metallic fleck paint.

Placement of Signage

Signs should be placed on the front of businesses over the door, and/or on the side of the building if more visible. If there is a large window area, extend the sign over the window. Signs can extend the full width of the building if stylistically appropriate. Where buildings do not have sufficient width or height to apply signs across the front of buildings, or where it would interfere with the architecture of the building, utilize projecting signs secured with wooden or metal supports sufficient to withstand weather loading.

The responsibility for this action plan rests with the Town and property/building owners in the downtown.

The budget estimates (preliminary Class ""C") and timelines for this Action Plan are summarized in the attached exhibit (to be completed).

5.5 Marketing (Partnerships) Action Plan

Destination marketing will be required to implement the strategy and to generate positive economic impacts. Because the Town of Carbonear does not have experience in tourism destination marketing, this Action Plan will require the hiring of an Implementation Coordinator (see Section 5.6) and partnerships with the BTTA and the Department of Tourism, Culture and Recreation.

5.5.1 Target Markets

Following the analysis of market opportunities, it is recommended that Carbonear's target markets adhere to the Newfoundland and Labrador Product Market Match Study's long-term strategy to strengthen cultural and heritage tourism products, develop festivals and events based on cultural and heritage experiences and build awareness of niche markets. It is also recommended that the target markets for Carbonear parallel the findings of the Newfoundland and Labrador Tourism Marketing Strategy Review (2002). This review identified the primary markets (Ontario and Maritimes), secondary market (North East U.S.) and trip markets (sightseeing/touring, adventure/nature viewing). Within this provincial framework, six markets were identified in the Carbonear product - market match (Section 4.7). They are culture and heritage, learning, kayaking/canoeing (soft adventure), nature-based, motorcoach and RV. Cruise ships (day trips) may also represent a niche market in the medium to longer term.

All of the target markets can be pursued using "below the line" marketing approaches and tactics, which is defined as efficient marketing that targets specific customers or customer groups.

5.5.2 Marketing Strategy

The consultants recommend a niche marketing strategy using "below the line" and partnership tactics because of budget limitations and available resources with partners (the BTTA, Department of Tourism, Culture and Recreation). This marketing strategy is different from traditional blanket marketing campaigns. Some of the recommended tactics are described in the next section. This program should be developed by the Implementation Coordinator to complement the broader based Province of Newfoundland and Labrador and Baccalieu Trail marketing program. It must also focus on maintaining relationships with existing operations.

5.5.3 Marketing Approach / Tactics

This section presents the recommended marketing approach/tactics for strategy implementation. These activities should be coordinated with the BTTA and the Department of Tourism, Culture and Recreation.

Local Resident Tourism Awareness Program

Under this program, the Implementation Coordinator (with support from the BTTA) would be responsible for improving local awareness to the benefits of tourism development in the Carbonear area, and stewardship of Carbonear Island. Activities should include:

- Present case studies
- Explain the strategy's benefits
- Circulate the Investment Perspective
- Set up a Carbonear Tourism Ambassador Program (trained volunteers in the community).

This program will broaden the awareness of tourism, and career opportunities, and begin to have local residents understand the influence they can have on tourists and their experience in the Carbonear area.

The budget for this program is included in the recommended operating budget (see Section 5.6).

Creative

The strategy requires a creative program that includes a new logo, a positioning statement and creative guidelines. The recommended logo was presented in Section 5.4. The position statement, as discussed at the beginning of this section, supports the primary, secondary and trip markets focus of the Department of Tourism, Culture and Recreation. The creative guidelines were also presented in Section 5.4 and could be expanded in partnership with BTTA.

Packaging

A two-phase packaging program is recommended. The initial phase should sell the Carbonear area prior to Carbonear Island access (infrastructure and programming) and the second phase should include the Island. The Implementation Coordinator should prepare a "Pilot Packaging Manual for Historic Carbonear" around the heritage/cultural theme that is sold through receptive operators in Atlantic Canada and the North East U.S.

The estimated production cost of the manual is \$7,500 with preparation by the Implementation Coordinator.

Web Site

A high quality and interactive Website is required. It should provide links to export ready operators. This Web site could be developed with input from the Department of Tourism, Culture and Recreation. It should function as a central resource in the Carbonear area. The following example is representative of a high quality site. The estimated cost is \$25,000 (Web designer) with annual maintenance estimated at \$5,000.



GREAT LAKES SHIPWRECK MUSEUM

- Museum
- Virtual Tours
- Shipwreck Society
- Online Shop**
- Edmund Fitzgerald
- Mariners Memorial
- Group Tours
- Overnight Program
- Map / Directions
- Press Release
- Shipwreck Stories
- Events
- Links
- Contact Us
- Send Site to a Friend
- Home



welcome

The Great Lakes Shipwreck Museum
and the Whitefish Point Light Station
in Michigan's Upper Peninsula.

We are glad you are here!

Overnight Accommodations... Stay at the Light Station

A unique travel and educational experience available year round, you can now visit Whitefish Point Light Station and experience premium overnight accommodations for an evening or two with guided museum tours. Click image for details.



Download a free brochure! (3.2mb)



Use Acrobat Reader to view the brochure



Shipwreck Coast Museum Store

Click here and explore the finest museum store and nautical shop in the Midwest featuring maritime art, limited edition prints and an exceptional collection of books, videos and music. We offer a superb online collection of brass maritime gifts, chronometers, and many fine gifts for your home, study, office or boat. We further compliment your online visit with a large inventory of exclusive lighthouse replicas and quality apparel for all seasons. Please call us toll free, 888-492-3747 with any questions or to order by phone.



Export-Ready Product

Successful strategy implementation will require export-ready products. Therefore, the Implementation Coordinator must maintain an inventory of export-ready tourism products. Ideally, all tourism operators should strive for the following benchmarks:

- Reachable 24 hours per day and 365 days of the year
- Have trained staff
- Understanding of needs of target markets
- Confirm rates or prices well in advance (one year for tour operators)
- Meet safety and health codes
- Adhere to sustainable tourism practices.

The Implementation Coordinator should assemble and maintain the inventory (electronic and hard copy) for use by tour operators and others with an interest in selling the Carbonear area.

Training

The Implementation Coordinator should prepare a tourism training needs and opportunity assessment in partnership with Hospitality Newfoundland and Labrador. The budget is included in the operations budget (see Section 5.6).

“Below the Line” Marketing

The Implementation Coordinator must place a priority on a low cost partnership-marketing program that includes:

- Heritage / cultural markets in association with clubs, magazines and educational institutions.
- Learning organizations like Elderhostel and the Royal Ontario Museum (ROM).
- Marine heritage groups, clubs and institutions.
- Nature soft/adventure markets in association with clubs and affinity organizations (Sierra Club) and specialty retailers.
- RV market in association with RV clubs and manufacturers and rental operators.

These activities will be undertaken by the Implementation Coordinator with input from the BTTA and Department of Tourism, Culture and Recreation.

Archival, Slide and Image Bank

Archival research undertaken for the strategy identified a need to consolidate historical records on Carbonear Island. This program should be undertaken with the Department of Tourism, Culture and Recreation.

PR Program

The 1997 Visitor Exit Survey revealed an overall low profile for the Carbonear area (Zone 17). The Town needs to develop a public relations program, in association with the BTTA, with the objective being a higher profile for tourism products and experiences. A familiarization tour (FAM) component should be included for travel writers and tour

operators. The focus should be on the heritage / culture sector with export-ready product.

The Implementation Coordinator and the BTTA will determine the budget for this program. Typical budgets can average \$20,000 to \$30,000 annually.

5.6 Implementation (Management and Organization) Action Plan

In tourism planning, there is often a tendency to just focus on new products and marketing. Such an approach in the Town of Carbonear could lead to failures, inefficient allocation of resources and lost opportunities. Capacity building is also a priority requirement for the strategy's implementation. In this context, an appropriate organization structure must be put in place to implement the recommendations. This structure must provide the Town of Carbonear and partners with the capacity to achieve the desired results. Without this capacity, three negative results could be expected:

- Local operators will not fully capitalize on current and emerging opportunities.
- Marketing programs will be ineffective.
- Internal conflicts will see energy go towards activities that are not part of the Plan.

To evaluate organization capacity options, the consultants conducted a balanced score card assessment of the current organizations involved in the Carbonear area. As discussed in Section II, this size-up is based on the premise that any successful tourism organization requires a balance of adequate funding or income, satisfied customers (tourists), happy employees and volunteers, and proper communication (including internal business processes). When balance is not in place, problems will result. For example, it is difficult for dissatisfied employees at a motel to provide a memorable experience to visitors.

As a small municipal unit, the Town of Carbonear has limited resources for current operations and new opportunities. This setting requires the Town to "think smart" when allocating or securing funds based upon current market conditions and future opportunities.

Every organization involved in tourism or economic development has different legacies, management focus, structure and style. Exhibit 5.4 shows the different stages of change that all organizations typically go through.

Phase 1: Creativity – In this phase, the structure is informal and the management style is individualistic and entrepreneurial.

Phase 2: Direction – In this phase, the focus is efficiency of operations, the organization structure is centralized and functional, and the management style is directive.

Phase 3: Delegation – In this phase, the management focus is expansion of services, the organization structure is decentralized and the management style is delegative.

Phase 4: Coordination – In this phase, the management focus in consolidation of operations, the organization structure is line staff or service groups, and the management style is watchdog.

Phase 5: Collaboration – In this final phase, the management focus is problem solving and innovation, the organization structure is a matrix of teams and the management style is participative.

Exhibit 5.4 Typical Organizational Practices Five Phases Of Organization Growth					
Category	Phase 1	Phase 2	Phase 3	Phase 4	Phase 5
	Creativity	Direction	Delegation	Coordination	Collaboration
Management Focus	Set Up & Sell	Efficiency Of Operations	Expansion Of Services	Organization Consolidation	Problem Solving & Innovation
Organization Structure	Informal	Centralized & Functional	Decentralized	Line Staff & "Product" Groups	Matrix Of Teams
Management Style	Individual & Entrepreneur	Directive	Delegative	Watchdog	Participative
Control System	Results	Standards & Cost Control	Reports & "Profit" Centres	Plans & "Investment" Centres	Mutual Goal Setting

Municipal units in Newfoundland and Labrador exhibit the characteristics of a Phase 2 - Direction and Phase 3 - Delegation organization. With the strategy, the Town and partners have two options:

1. Allow the Town to maintain it's current organizational focus as the lead agency for implementation.
2. Deconstruct the current structure to a Phase 1 – Creativity organization for a “Carbonear / Carbonear Island tourism “relaunch” under the strategy with very different relationships between the Town and partners.

The consultant’s experience with tourism and municipal government managed change programs indicates that decisions on a tourism development are strategic, policy and

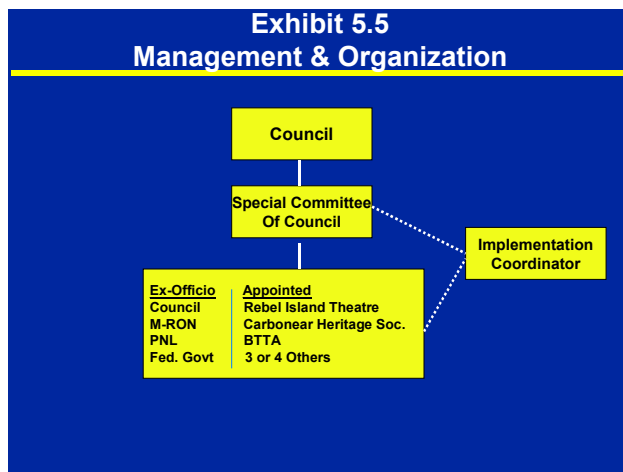
operational decisions. The Town of Carbonear, with senior government partners, is the preferred organization to make strategic decisions. In this context, the current working relationships should remain. Policy matters can fall under many different jurisdictions. If public policy is defined as an outcome of strategy, then municipal-related tourism policy should remain with Town Council and implementation should fall to Town staff. To broaden the base of input to public policy for the study area, a more formal structure should be considered for annual reviews with the key stakeholder organizations. These organizations include, but are not limited to:

- Town of Carbonear
- Baccalieu Trail Tourism Association (BTTA)
- Baccalieu Trail Heritage Corporation
- Provincial Department of Tourism, Culture and Recreation
- Rebel Island Theatre
- Hospitality services representative
- Carbonear Historical Society

A key objective for any changes in working relationships should be differentiation for the Town in the current and expected future tourism market. The requirements of this differentiation are set out in the Action Plans. They can be summarized as:

- Target marketing
- Customer focus
- Consistent high quality
- Product or service leadership.

The Town of Carbonear should perform this oversight role with input from M-RON, the BTTA and the Department of Tourism, Culture and Recreation. Ideally, this role would have an expanded budget for marketing, service quality and promotions. This expanded budget could allow for a new position called Implementation Coordinator (minimum of two years), as the strategy’s objectives cannot be achieved on an interim basis by freeing up the time of current staff.



The consultants reviewed organization structures for more formal reporting of partners to the Town. The recommended structure (Exhibit 5.5) would see a Special Committee of Council responsible for overall strategy implementation. This committee would consist of ex-officio members (Council, M-RON, Province and Federal Government) and appointed members from such organizations as Rebel Island Theatre, Carbonear Heritage Society and BTTA. The terms of members should be staggered from one to

three years to permit consistency in governance and oversight. Renewed appointments should be permitted.

Key benefits of this structure are more accountability and customer focus, and greater efficiencies and responsiveness. It should also reduce “turf wars”, resource reallocation and customer confusion. A purpose of the recommended structure is to retain formal working relationships within current organizations and to focus on volunteers for financial and operational support. The need to maintain volunteerism and strong “legacy cultures” within all partner organizations are the primary reasons that partners should not be formally absorbed within an expanded Town divisional or functional structure. Hence the recommendation to follow a committee of council approach.

In this setting, partner organizations should maintain their current focus. Support from the Town and senior government under the strategy’s implementation should be expanded beyond operational need and include a requirement for all partners to:

- Improve service standards.
- Effectively participate in the strategy’s implementation and annual reviews.
- Conduct annual self-assessments.
- Participate in cooperative marketing and promotions.

Town staff, volunteers and partner organizations have achieved past successes. Many of these accomplishments have resulted from the dedication and passion of those involved. Past successes can be further enhanced by a formal approach to the self-assessment appraisal of partners and the Town. The quality of committee members is an important evaluation factor for government funding partners, and the local tourism sector’s growth and evolution. The knowledge and experience of the committee members can be maintained by self-assessments that assist in focusing priorities on the demands facing the Carbonear area’s tourism sector. With this matching, improved performance will translate into better governance and hence more tourist sales.

The consultants recommend that all partner organizations conduct annual self-assessments as a condition of direct involvement in the strategy. The self-assessments should focus on the following:

- The organization’s ability to define its responsibilities and establish annual objectives.
- After Year 1 of the strategy’s implementation, the partner organization’s ability to track achievements with annual objectives.

One of the initial tasks of all partners under the strategy should be to set up an annual self-assessment (exhibit 5.6). The consultants recommend that a multiple-choice survey of all committee members (organizations) be conducted with results tabulated and circulated. At a minimum, we recommend that the following questions be included in the survey.

**Exhibit 5.6
Recommended Annual Self Assessment
Partner Organizations & Town of Carbonear**

The following survey is a poll to help you think about the performance of (Insert organization name) as a group. It is intended to enhance the Special Committee of Council For Carbonear Tourism’s overall effectiveness. Please indicate to what extent you agree with the following statements concerning the functioning of the committee as a whole.

Please circle one response for each item.

<i>The Special Committee of Council:</i>	<i>Strongly Agree</i>	<i>Agree</i>	<i>Neither Agree Nor Disagree</i>	<i>Disagree</i>	<i>Strongly Disagree</i>
Has sufficient information for staff (Implementation Coordinator) evaluation.	1	2	3	4	5
Has in place an appropriate process for senior staff succession.	1	2	3	4	5
Spends appropriate time discussing the long-term future of tourism in the Carbonear area.	1	2	3	4	5
Has a vision and strategic direction that is understood by all partner organizations.	1	2	3	4	5
Proposes changes in overall direction.	1	2	3	4	5
Is prepared to deal with unforeseen crises like funding commitments.	1	2	3	4	5
Have appropriate structures and processes to evaluate the strategy’s implementation.	1	2	3	4	5
Lets the Implementation Coordinator run day-to-day activities.	1	2	3	4	5
Effectively inquires into operational deficiencies.	1	2	3	4	5

The Town and partners must refine the implementation costs of this Action Plan. The final costs will be determined by senior government support for the hiring of the Implementation Coordinator when operating budgets will be prepared. The Action Plan has been prepared on the following assumptions:

- The operating budget for the strategy's implementation is estimated to cost approximately \$100,000. The distribution of funds is assumed to be senior government dependent. This estimate is based on the following:
 - Implementation Coordinator \$65,000
 - Administrative (Part Time): \$15,000
 - Travel and Operations: \$20,000.
- The Town and M-RON will coordinate their efforts in securing funding.
- There will be one-time start-up costs that include securing community and senior government support, and launch-related functions. The Implementation Coordinator will scope the budget for these costs.

To set up the strategy's implementation, the consultants recommend the following tasks:

1. A management and organizational team be set up (as shown in Exhibit 5.5) for the purpose of overseeing the implementation of the overall Development Strategy, securing adequate funding and exercising regulatory controls.
2. Committee membership should not be restricted to Town residents, but a majority of members should be from the Town. The terms of the recommended 10 plus members should be staggered for one, two or three years to permit continuity and allow for fresh thinking.
3. After the committee is operational, a subcommittee should be formed to hire the Implementation Coordinator.
4. Another start up task will be to select the Chair. The person could be from outside the committee (appointed for three years after selection). A key decision on selecting this person is his or her ability to represent, with respect, the overall intent of the strategy.
5. The Search Sub-Committee should have a mandate to recommend (to Council) the hiring of the Implementation Coordinator. An advertising campaign throughout Newfoundland and possibly the Maritimes should be used. The Sub-Committee may wish to seek informal input from a group of volunteer advisors (Atlantic Canada-wide) to select two or three candidates for interviews. The selection criteria for the position should include both experience or skill sets with an understanding that management skills are more important than education credentials. More specifically, the factors to consider in a hire/no hire decision could include:

- Tourism sector expertise
- Measurable results from recent engagements
- Good interpersonal skills
- Maturity of character
- An approach to work that is proactive
- A commitment to community activities
- Experience working with municipal councils and non-profit organizations in rural and small town settings

After the Implementation Coordinator is hired, the Search Sub-Committee will be dissolved.

The recommended specific responsibilities of the Implementation Coordinator should include the following:

- Day-to-day direction and supervision of the strategy's implementation
- Being accountable for his or her actions
- Preparing a Business Plan (strategy implementation)
- Adhering to the requirements of funding partners
- Preparing detailed budgets for Action Plans
- Supervising of staff (seasonal and part-time)
- Preparing annual reports, process reports and research reports
- Organizing meetings with various stakeholders and the public
- Distributing information about Carbonear Island and the local area.

The Implementation Coordinator should be given a two-month period to prepare the Business Plan (Strategy Implementation) for Year 1. This Business Plan should focus on refining the Action Plans presented in Section V into operational activities. Monthly or biweekly time allocation budgets should be prepared, along with an assessment of risk (see Exhibit 5.9)

5.7 Financial Plan

Exhibit 5.7 presents the Multi Year Financial Plan for the Carbonear Island Development Strategy and Exhibit 5.8 display a proposed timeline for implementation. The Plan lists the start-up cost for each of the action plans and, where appropriate, estimates the amounts needed for annual maintenance. As the multi-year plan shows, the initial Town upgrades, including the preparation of the proposed embarkation site is projected to cost \$175,050.00. The cost of a landing site and the necessary upgrades on Carbonear Island are estimated to be \$80,040.00, and expenditures to cover the cost of new employees will average \$100,000.00 per year. These expenditures, especially the employee costs, may be decreased during the phased-in implementation period by the town allocating a portion of its current staff resources and volunteers to work on the project.

The key assumptions that frame the Financial Plan are:

1. All dollar values are based upon the purchasing power of a dollar in 2004.
2. Insurance costs are expected to increase at 5% per year (above 2004 purchasing power) to 2009.
3. Operational support for the Carbonear Island Development Strategy is assumed to remain at the 2004 level of \$100,000.00
4. All development projects under the Physical Improvements Action Plan should be wheelchair and handicapped accessible.
5. The Town Related Upgrades assumes the completion of a harbour-side boardwalk by 2009.
6. Town functions related to commercial and retail infill projects are non-development related.
7. The development of the “vest pocket” park at the intersection of Water and Musgrave Streets has a budget estimate (Class D) of \$16,200.00 for land and development. The town should consider applying for support under Federal/Provincial cost-sharing programs.
8. The development of the special events plaza at the intersection of Water and Adelaide Streets has a budget estimate (Class D) of \$32,800.00 for development. The town should consider applying for support under Federal/Provincial cost-sharing programs.
9. Under the Signage, Image and Identity Action Plan, the Informational Signage Program includes multi-year upgrades to directional signage, welcome signs, parking signs, street kiosks and graphics packages.
10. The Partnership Marketing Campaigns focus on “below the line” markets such as Elderhostel and the Smithsonian Institute.

Exhibit 5.7			
Summary of Probable Costs (\$2004)			
Action Plans	Initial Cost	Annual Cost	Comments
Town Related Upgrades			
<i>Parking Areas</i>	\$10,000		
<i>Sidewalk, Curb and Gutter</i>	\$57,100		See Concept Map Exhibit 5.2
<i>Waterfront Boardwalk</i>	\$17,200		Extend to new embarkation dock
<i>"Vest Pocket" Park</i>	\$16,200		Corner of Water and Musgrave Streets
<i>Special Events Plaza</i>	\$32,800		Corner of Water and Adelaide Streets
<i>Scenic Lookouts</i>	\$20,000		
<i>Public Washroom</i>			Sufficient number in Community Centre
<i>Accessibility</i>			Accessible now, included in new estimates
<i>Embarkation Area</i>	\$51,750		Cribbing and Floating Dock
Island Infrastructure and Site Services			
<i>Docking Facility</i>	\$70,840		With removable Information Panels
<i>Access Stairway</i>	\$9,200		
<i>Walking Trail</i>	\$150,000		With removable Information Panels
Signage, Image, Identity			
<i>Logo Registration</i>	\$2,500		See Section 5.4
<i>Logo Media</i>	\$5,000	\$2,000	Carbonear Historic Self-guiding Map, Informational Map of the Island
<i>Information Signage</i>	\$15,000	\$3,000	
Marketing (Partnerships)			
<i>Implementation Coordinator</i>	\$65,000	\$65,000	
<i>Administrative</i>	\$15,000	\$15,000	
<i>Travel and Operations</i>	\$20,000	\$20,000	
<i>Tourism Package</i>	\$75,000		
<i>Web Design</i>	\$25,000	\$5,000	
<i>Public Relations</i>	\$20,000	\$10,000	In Association with BTTA
Implementation			
<i>Special Committee of Council</i>	\$10,000	\$10,000	

Exhibit 5.8					
Proposed Implementation Schedule					
Action	Year 1	Year 2	Year 3	Year 4	Ongoing
Adopt Plan	■				No
Town Related Upgrades					
<i>Parking Areas</i>	■	■	■		No
<i>Sidewalk, Curb and Gutter</i>	■	■	■		No
<i>Waterfront Boardwalk</i>			■	■	Yes
<i>“Vest Pocket” Park</i>			■		No
<i>Special Events Plaza</i>	■	■			No
<i>Scenic Lookouts</i>			■	■	No
<i>Public Washroom</i>			■	■	No
<i>Accessibility</i>			■	■	Yes
<i>Embarkation Area</i>			■	■	No
Island Infrastructure and Site Services					
<i>Docking Facility</i>			■	■	No
<i>Access Stairway</i>			■	■	No
<i>Walking Trail</i>			■	■	Yes
Signage, Image, Identity					
<i>Logo Registration</i>	■				No
<i>Logo Media</i>	■	■			Yes
<i>Information Signage</i>	■	■	■		Yes
Marketing (Partnerships)					
<i>Implementation Coordinator</i>	■				Yes
<i>Administrative</i>			■		Yes
<i>Travel and Operations</i>	■	■			Yes
<i>Tourism Package</i>		■	■		Yes
<i>Web Design</i>		■	■		Yes
<i>Public Relations</i>		■	■		Yes
Implementation					
<i>Special Committee of Council</i>	■				Yes

Implementation of the strategy will involve a level of risk. These challenges will not be unique and will mirror the experiences of other groups seeking a similar vision. One of the functions of the Implementation Coordinator should be risk management as there is a direct relationship between risk and reward. In this context, risk management for the strategy's implementation should have two objectives:

- The identification of potential risks.
- If these risks are deemed to be unacceptable, then strategies must be put in place to reduce, transfer or (ideally) eliminate exposures.

Exhibit 5.9 Template To Isolate Risk Exposures									
Type of Risk By Action Plan	Acceptable Level of Risk		Preferred Option - Risk Reduction	Preferred Option - Risk Transfer	Preferred Option - Risk Eliminate	Actions - Council	Actions - Sub-Committee	Actions - Partners	
Funding / Financial									
Market (Local & External)									
Government Policy or Program									
Environmental									
Economic									
Service Provider (Tours, Food, etc.)									

5.8 Economic Impacts and Benefits

The Department of Finance has prepared economic impacts of total tourism spending in Newfoundland and Labrador. The impacts were based upon 1998 data of total tourist spending estimates of ±\$580 million (59% resident tourist spending taken from the Canadian Travel Survey). The remainder of the spending related to non-resident activity taken from the province's own air and auto exit surveys.

The Department of Finance has prepared the tourism economic impacts for Gross Domestic Product (GDP) that is a measure of value added. The direct GDP at factor cost (now called basic prices) derived from tourism spending was \$172.5 million. The Department further estimated that for every \$100 in direct GDP, there is an indirect multiplier of 1.43. While the Department did not prepare induced tourist spending impacts, a standard rule of thumb is that the induced multiplier is ±1.3 of direct and indirect impacts. The result is a direct and spin-off impact multiplier of ±1.85. This multiplier was reviewed with the Department of Finance in June 2004 and it is considered reasonable. The result for Newfoundland and Labrador is every \$100 of direct GDP should produce \$85 of indirect and induce impacts. Based upon 2003 estimates, there were 441,400 non-resident trips to Newfoundland and Labrador. These trips generated total expenditures of \$316 million (excluding non-resident airfares) or \$716 per trip.

With around 9.0% of party visits and 6.5% of party nights in 1997, Zone 17 is experiencing (2003) in the range of \$25 to \$30 million in tourism sales. Applying Atlantic Canada indicators, it is reasonable to assume that the strategy's implementation can increase sales by \$1 million or more. With a \$1 million increase, tourist receipts in the Carbonear area will annually produce:

- 20 to 30 direct and indirect jobs
- \$300,000 to \$350,000 in direct and indirect payroll
- \$125,000 to \$150,000 in sales taxes (HST) and municipal taxes

Appendices

Appendix A: Archival Research Project

Appendix B:

Request for Proposals

Terms of Reference



Request for Proposals

“Carbonear Island Development Strategy”

Mariner Resource Opportunities Network Inc. (M-RON Inc.) is seeking proposals to complete a comprehensive development strategy for the development of Carbonear Island and surrounding area.

Qualified consultants should submit a letter of intent along with a corporate profile including an outline of relevant experience in a related field.

Terms of Reference may be obtained at the: Mariner Resource Opportunities Network Inc. office, 27 Goff Avenue, Carbonear. All letters of intent must be received by 4:00 p.m. on May 2, 2003. For additional information, please contact Mr. George Parsons, Executive Director, Mariner Resource Opportunities Network Inc. at (709) 596-4470, or gparsons@nfld.net.



Terms of Reference
Mariner Resource Opportunities Network Inc.
Carbonear Island Development Strategy

Mariner Resource Opportunities Network Inc.(M-RON) has secured funding to undertake a comprehensive study into development opportunities for Carbonear Island and surrounding area. In this regard, we are seeking proposals from qualified consultants for the design and delivery of a conceptual plan. The consultant will be expected to achieve the following functions and objectives:

- Comprehensive consultation strategy with the Project Advisory Committee as established by M-RON Inc. including opportunities for other relevant stakeholder participation.
- The Consultant will be required to define how the accessibility issue will be addressed in the report.
- The report must address issues of ownership of land, any buildings that might be situated on the property and any regulatory issues (i.e. Parks Canada)
- Recommendations must specify options regarding development, and issues as it relates to not-for-profit agencies and/or private enterprises.
- The report should include a detailed outline regarding a plan for sustainability.
- The Consultant should address issues regarding possible management structure and plan.
- Issues regarding potential recommendations including proposed sources and the use of these funds.
- The report should include design drawings, and/or concept plans to indicate and identify scope of initiatives where appropriate.
- Identify and analyze specific project objectives, activities and possible partnerships for the short and long term development agenda.
- Determine marketing opportunities and materials for the purpose of promoting Carbonear Island as a National Historic Site, a possible anchor for tourism development, and a venue for the growth of heritage and cultural promotion.
- Details of a marketing strategy to address how development initiatives will be marketed must be included in the report.
- Develop a long-term strategic plan based on identified initiatives and appropriate phase development structure.

Terms of Reference (continued)

Methodology and Duration:

Though community involvement, consultation and strategic planning, develop a conceptual plan for the development of Carbonear Island in the town of Carbonear with historic relationship to surrounding areas i.e. Freshwater, Bristol's Hope, Harbour Grace, etc. Develop and document key recommendations and possible timelines resulting from the findings. A final report will be submitted to M-RON Inc. and shall include all necessary details as it relates to successfully carrying out this project.

Awarding of Contract:

The awarding of the contract will be based on the submission of a comprehensive work plan and work schedule outlining the approach of the project, timelines and an expected completion date. It will also include a detailed budget of costs associated with carrying out the project.

The consultant will include a list of projects undertaken in the past to demonstrate the various skills required for this project. Bidders will also be required to provide a work example and references.

The lowest rates and/or bid will not necessarily be accepted. The degree of creativity, development innovation and overall cost will be major considerations in the awarding of the contract.

Proposed Fee:

The successful consultant's fee will be based on the development of a signed contract. Associated costs identified in the contract (i.e. accommodations and travel) will be paid based on presentation of actual invoices and must be reflected in the budget breakdown. The consultant proposal must acknowledge full acceptance of the terms and conditions set out in the document. Payment will be based on: 1/3 start of the project, 1/3 on receipt of mid-term progress report, and 1/3 on completion of the final report.

Billing:

An invoice must be issued when the contract is signed and payment will be expedited following acceptance of this proposal. All payments will be based on presentation of an official invoice based on a 30-day net term unless otherwise agreed to by both parties.

Authorization to Proceed:

The official signatures of both parties will constitute an authorization to proceed with the project, including detailing a contract for services.

Consultant's Signature

Date

M-RON Inc. Chairperson

Date

Appendix C: Quebec Declaration on Ecotourism