TWILLINGATE ISLANDS
TOURISM MASTER PLAN
VOLUME I

Prepared for:

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EXECUTIVE SUMMARY (Volume I)

INTRODUCTION

Twillingate Islands, consisting of North and South Twillingate, are located in Notre Dame Bay, one of the most scenic bays on the island of Newfoundland’s northeast coast. Two incorporated communities are located on the islands: The town of Twillingate is on both the North and South Twillingate Islands and the town of Crow Head is on the most northern part of the North Island. One local improvement district and four unincorporated settlements are also located on the two islands.

Twillingate Islands have been considered a provincial tourism destination for many years. The area’s scenic rugged beauty; numerous natural harbours, coves and islands; stately historic homes and merchant premises, and friendly people have long attracted visitors. Although some other Newfoundland communities have similar attributes, the Twillingate area has a combination of additional factors that make it a popular tourism draw. Tourists, tour operators and provincial tourism authorities know the area to consistently provide more provincial icons (i.e. icebergs, whales, living fishing village, lighthouse, music/food and culture) in one place than most other Newfoundland communities. Tourists can also go there and be assured of experiencing a genuine Newfoundland outport that is of sufficient size to offer accommodations, food, and activities as well as basic services such as a gas station, pharmacy, laundromat, and grocery. Twillingate Islands are also strategically placed half way between St. John’s and the west coast and are, therefore, a convenient, worthwhile and scenic stop over point.

Despite Twillingate Islands being considered a “diamond in the rough” by tourism authorities, other Newfoundland tourism locations (e.g. Bonavista, Newtown, Gambo, etc.), with some of the same comparable tourism attributes, have moved ahead because of united efforts to develop and implement a comprehensive tourism plan. The Twillingate Islands Tourism Master Plan is designed to address this situation.

The Twillingate Islands Tourism Association (TITA) has commissioned this study. The purpose of the Tourism Master Plan is to help Twillingate Islands increase its tourism visitation by strengthening its position as a provincial destination of choice through strategic tourism development of the cultural, heritage and natural assets of the two islands. The Plan is designed to match market interests with tourism product development (i.e. ensure that the Twillingate Islands tourism product matches the interests of the majority of tourists visiting the area) and to rectify weaknesses in the existing tourism product through results-oriented and cost effective methods.

The proposed Plan provides a clear direction for Twillingate Islands’ tourism for the next ten years with specific directions for the next three to five years. It describes the existing product, analyzes its weaknesses in terms of tourism demand, provides practical methods for strengthening and enhancing the product, and outlines how, by whom, when and at what general cost tourism opportunities should be developed. These recommendations complement and build on the provincial tourism strategy and are based on a thorough understanding of Twillingate Islands as well as the Kittiwake Coast tourism product including its people, their heritage and environment. The recommendations are also based on national and international tourism trends, comparative research of success factors in other appropriate jurisdictions and proven market analysis.
KEY MARKET SEGMENTS WITH POTENTIAL FOR TWILLINGATE

Based on extensive research for this Plan, as well as the recently completed Newfoundland and Labrador Marketing Strategy Review prepared by The Economic Planning Group, a number of market segments have been identified that may have potential for Twillingate Islands. These are:

- General Touring/Explorer Market
- Eco and Adventure Tourism Market
- Cultural and Heritage Tourism Market, including learning vacations
- Getaway Vacations

Based on the research conducted, it is evident that, from a socio-demographic perspective, it is the affluent mature and senior market segment that generally offers the best potential for Newfoundland and Labrador, and for the Twillingate area. This market has the following key characteristics:

- It represents 3.5% of the Canadian market and 4.7% of the US market
- 85% of this segment are between the ages of 35 and 65 years
- 100% are university educated and have household incomes over $80,000
- They travel much more frequently than other market segments – an average of some 14 overnight trips per year compared to the Canadian average of 7.1 overnight trips per year
- They are much more likely than most other market segments to travel to other states/provinces
- They are generally more likely than other market segments to seek out the following types of experiences while travelling:
  - Exploratory experiences including to see and experience natural wonders, historical sites, different and distinctive cultures and unspoiled nature – things that are different from one’s day to day experiences
  - Nature sightseeing – viewing wildflowers, bird watching, other wildlife viewing
  - Golf
  - Shopping and dining
  - Museums, art galleries and historical sites
  - High arts such as theatre, classical music concerts
  - Garden related attractions, botanical gardens and natural wonders
  - Seaside resorts
  - B&Bs
  - Touring by personal vehicle
  - Wine tours
  - Ocean cruises

While some of these activities and interests are not products that Twillingate can provide, there are many that are an ideal fit with the natural, heritage and cultural resources offered in the Twillingate area.

Twillingate and the entire central region of Newfoundland face tough competition from the Avalon Peninsula as well as Western Newfoundland, both of which have more tourism product and infrastructure in place, and better access for tourism markets, both for touring trips as well
as getaways for non-resident tourists. So, for trips by non-resident tourists of a week or less in the province, these other regions have strong advantages.

For visitors on longer touring trips in the province, Central Newfoundland and Twillingate Islands are in a better position, particularly for trips involving cross-island travel. The kinds of tourism initiatives that can help build visitation from this market segment include:

- Suggestions for unique local self-guided itineraries and packages of a day or less in duration that can be readily added to touring trips
- More outdoor adventure outfitters and operators
- More shopping and dining opportunities, particularly involving local crafts and menu items
- Conservation of heritage buildings, businesses and way of life
- More opportunities to meet local residents and share in their entertainments and local events
- More opportunities to learn more about the history and culture of the community
- More emphasis in marketing of the dinner theatre program in the community

The ‘personal explorers’ and ‘exotic tour seekers’ segments of the leisure tourism and touring marketplace are of particular interest to Newfoundland and to Twillingate Islands, as these are people prepared to travel more, farther and spend more if the experience at the other end is worth it and of a unique character.

For the Newfoundland resident market, there are two opportunities: the getaway market and as a stop on a vacation trip. Newfoundland residents living within a reasonable driving distance (i.e. from Central Newfoundland) represent a potential getaway market for the community. However, limited potential is seen for more distant resident markets such as from the Avalon, and for off-island tourist getaway trips to the area. The kinds of planning that can help develop this market include:

- More unique events
- Getaway packages involving experiences unique to the area and the community
- Value-added and off-season savings offers

Twillingate Islands are also well situated to attract a portion of the Newfoundland resident vacation market – as a stopping point on vacation trips across the province or as part of longer stays in the Twillingate area.

Special interest and leisure-learning markets are less affected by logistical factors and represent a latent market sector for Twillingate Islands. However, excellent offerings are a prerequisite. Suggestions for the community include:

- Structured learning/enrichment packages based on culture, nature and heritage, and
- Guided interpretation tours based on local community history, natural features

The rapid growth in role of the Internet as a trip planning aid for travellers presents a major new opportunity for places such as Twillingate Islands, in allowing them to reach external markets likely to have an interest in the area’s unique appeals and products.
INSIGHTS FROM ELSEWHERE

In-Bound Tour Operators

All tour operators found Twillingate to be a very good tourism destination, primarily as a day or side trip. They found the product to be of sufficient quality for their clientele with enough attractions for a good day or half day trip and well located within the seven or 14-day tour package of the province. Specific strengths of the Twillingate Islands product include the number of Newfoundland icons found in one place, the town of Twillingate’s ongoing existence as an viable outport community, its natural harbour, the quality of the attractions, and the friendliness of the people. A majority of coach tour operators from outside the province suggested that due to the unreliability of the Argentia ferry service and their own tight itinerary schedule, it would be unlikely that they would offer overnight stays, even if accommodations existed. However, tour operators providing individual “package” tours would continue to recommend Twillingate Islands as an over night stay.

Lessons Learned From Comparable Communities

Several tourism-based communities were studied in Atlantic Canada to learn how they strengthened their tourism product. They offered a number of valuable lessons for Twillingate including the following:

- Need critical mass of product and clusters of product.
- Develop partnerships among those involved in tourism in the community.
- Build a destination, not just accommodations.
- Create a destination-marketing program.
- Foster the hub approach (i.e. The community is the hub and the spokes are the things to do and see in the area).
- Build a good website – This is now a basic, and critical requirement.
- Provide reasonable support infrastructure (e.g. Good roads, signage, visitor information services and publications, community tourism website).
- Develop quality accommodations (e.g. Too many operators build properties that are considerably below the standard the province’s travellers prefer).
- Foster enthusiastic volunteers.
- Build capacity and quality first before taking the product to market.
- Emphasize quality in everything (e.g. Facilities, programs and services for tourists need to meet contemporary expectations of the affluent, urban North American traveller).
- Ensure good standards of hospitality and customer service.
- Create only genuine, authentic cultural and natural heritage (i.e. Today’s travellers want ‘the real thing’. Take care not to make an area too ‘touristy/tacky’).
- Design for the tastes of the market, not your own – This is a particular challenge for Newfoundland, as the tastes and expectations of visitors are considerably different from island residents in a number of respects.
- Encourage entrepreneurship.
- Listen to your customers.
- Foster the growing tourism market among Newfoundlanders (i.e. Provincial residents are increasingly doing what visitors are doing.
- Seek Government support using a planned approach.
- Ensure funding is adequate to get the job done right (i.e. In Newfoundland, too much volunteer effort is expended on seeking insufficient funding to do the job well).
o Growth products (i.e. Tourists to Newfoundland are increasingly seeking soft adventure, scenery and interactive/educational experiences).

o Put in time and effort (e.g. The market development period takes years, and consistent effort).

o Bring people along (e.g. A special effort has to be made on a continuing basis to help people in the industry and the community to understand what it takes to grow tourism, and why it is worth the effort).

o Don’t chase every market (i.e. Concentrate on those in which you can truly compete, and that can get to your destination easily).

o Generate repeat visits through event-based programming.

STRENGTHS/WEAKNESSES/OPPORTUNITIES/THREATS (SWOT) ANALYSIS

General Comments

o The town of Twillingate’s strength lies in it still being a genuine Newfoundland outport with a working fish plant, natural harbour, historic buildings, friendly people and rugged beauty, yet of sufficient size to offer all the necessary amenities for tourists such as accommodations, food and activities as well as services such as gas stations, pharmacy, Laundromat, grocery and building supply stores, etc.

o Opportunities to see icebergs up close are more prevalent on Twillingate Islands on a consistent basis than in most other parts of Newfoundland and Labrador. The opportunity to also see whales is a value added experience for most tourists.

o The town of Twillingate's harbour as well as the many coves and bays on the two islands are still ringed with historic houses, wharves, fishing stages and sheds that are important tourism features to tourists discovering the area. Many outport communities in the province have fallen prey to ribbon development due to lack of natural features as well as planning and zoning.

o Twillingate Islands offers consistently more of the provincial icons (i.e. icebergs, whales, living fishing village, music/food, lighthouses, etc.) in one place than most other Newfoundland or Labrador communities.

o Twillingate Islands are strategically placed half way between St. John’s and the west coast and are, therefore, a convenient, worthwhile and scenic stop over point in an area somewhat underdeveloped in tourist attractions.

o The attractions and activities offered on Twillingate Islands match the interests of the primary market segments visiting the province (e.g. general touring/explorer market, eco and adventure tourism market, culture and heritage market and on island getaway vacations).

o Provincial and national tour operators agree that Twillingate Islands are a very strong tourism destination with good growth potential providing the islands enhance what they have and don’t make drastic changes to the existing product.
Human Resources

- Twillingate Islands has a small, but strong, energetic, and dedicated tourism organization.

- As a result of efforts of one B and B owner, all B and Bs are working cooperatively together in an informal manner to ensure that, whenever possible, tourists find a place to stay on Twillingate islands.

Transportation

- Twillingate Islands can be reached from either the east through Gander or west through Notre Dame Junction making it possible for tourists to drive a loop rather than backtracking, as is the case with many of the scenic side roads off the Trans-Canada Highway.

Natural Tourism Attractions and Activities

- The region's rugged beauty has attracted tourists for many years. While other regions may have similar beauty, the combination of rocks and cliffs as well as numerous small islands, harbours, coves and bays sets Twillingate Islands apart.

- The drive through New World Islands and Twillingate Islands to the town of Twillingate is very scenic due to the many bodies of water that are crossed and the numerous small islands that dot the bays and coves.

- Opportunities for soft adventure (e.g. walking, hiking, kayaking, boat touring) experiences are numerous, varied and very scenic and have the potential to be of high quality.

- Boat tours to see icebergs, whales, coves, bays and islands are integral to providing a full suite of activities for the explorer and ecotourist market.

Cultural Tourism Attractions and Activities

- Despite its relatively small size, the town of Twillingate has a good mix of attractions (e.g. dinner theatre, museums, living interpretation of the fishery, historic buildings) and a good base upon which to build. On a competitive basis with other provincial and national small-scale attractions, several of the Twillingate Islands attractions are of outstanding quality (e.g. Twillingate Museum, Long Point Lighthouse, Prime Berth).

- Tourists, tour operators and government officials have cited All Around the Circle Dinner Theatre as one of the best dinner theatres in the province.

- The Fish Fun and Folk Festival is one of the more stable and successful festivals in the province.

- The built heritage of the area has been well documented and offers a variety of styles and building types that have the potential for being an increasing tourism draw providing
that steps are made to preserve and enhance existing structures of merit before they further disintegrate.

- Community and street names are unusual and could be a value added attraction if given appropriate signage and interpretation.

**WEAKNESSES**

**General Comments**

- Often local tourism operators develop a product based on their own needs or interests without understanding the tourism market's needs or expectations. Twillingate Islands attract primarily a well-educated high-income clientele, but sometimes the product does not match those needs/expectations, particularly restaurants, bars, general infrastructure, and some B and Bs and activities.

- The unplanned approach to tourism on Twillingate Islands has resulted in inconsistency of product.

- The existing lack of cooperation among many of the tourist operators or businesses sometimes manifests itself publicly during tourism season. This lack of professionalism can do irreparable harm to an otherwise good product.

- No accurate method exists to track the number of tourists visiting Twillingate Islands or the contribution of tourism activity to the region's economy. Good information on current visitors is important when planning and preparing tourism attractions, activities and services.

**Land Use and Infrastructure**

- The entrance to the town of Twillingate could be improved given that a tourist’s first impression of a place is very important.

- One of several important and positive attributes of the Twillingate Islands tourism product is Twillingate Harbour, yet little has been done to build on that advantage.

**Human Resources**

- Few local tour operators have received any formal tourism training.

- No tourism training programs are available in the region for residents.

- Despite some younger people recently entering the tourism/service business (e.g. restaurants), for the most part, younger people are not involved. In tourism, as is the case of all businesses, one always needs to build an industry for the future.

- Despite the efforts of TITA, a general lack of awareness exists about tourism within the general population of the area, about the opportunities presented by tourism and about the realistic types of efforts, initiatives, activities and attractions that are needed to be undertaken to make it appealing to the type of visitors now frequenting the area.
Transportation

- Motor coach tours have experienced ongoing difficulty in planning and delivering tours to Newfoundland because of the Argentia ferry’s unreliable schedule. The result is that many of the coach tours are planning west coast tours only, using the more reliable Port aux Basque ferry.

- The roads coming into Twillingate are in poor condition.

- Clear signage to Twillingate; signs indicating upcoming bumps, sharp turns and intersections as well as centre lines do not exist on the main roads coming to Twillingate Islands.

- The instability of the airlines as well as the high cost of travelling by air to Newfoundland is an overall deterrent to tourism that also affects tourism to Twillingate. Airfares between St. John’s and Gander are particularly prohibitive ($538.00).

Natural Tourism Attractions and Activities

- Twillingate Islands have begun the task of marking and interpreting trails connecting some of the more important natural attractions in the area, but it needs to be brought to a higher level of market-readiness in terms of trail development, signage and interpretation.

- No paths, signage and interpretation has been done within any of the towns or communities on Twillingate Islands which, to date, has been a missed tourism opportunity.

- A good quality, accurate interpretative map or maps of Twillingate Islands is lacking which would connect themes, icons, history and culture of the area with paths, roads and trails.

Cultural Tourism Attractions and Activities

**Built Heritage**

- No concentrated effort has been made to preserve, protect and promote the documented heritage structures of the two islands.

**Museums and Archives**

- Each of the museums has plans for future cataloguing, interpretation and expansion, but limited funds. Little coordination of effort occurs between the organizations in terms of activities, exhibits, cataloguing or services.
Existing Tourist Services

Restaurants
- Food of poor quality and limited variety is an ongoing and common complaint among tourists and in-bound tour operators. The primary criticisms include an over abundance of fried food, lack of fresh salads and fish, limited menu items reflecting Newfoundland’s culture and lack of an upscale or atmospheric restaurant. Tour operators and tourist also noted the lack of coffee shops or small “stop in” places to get a cup of coffee and a homemade bun or cookie. They also said that a small quality bar was lacking in the summer time.

Bed and Breakfasts and Inns
- The number of tourists to Twillingate Islands is increasing, but the number and quality of B and Bs and small inns has not kept pace with demand resulting in the region losing valuable income.
- Ensuring that the quality and fit of services matches market needs and expectations is becoming an issue.
- Rooms with private baths are essential for most tourists. While the number of B and Bs in the area with private baths is increasing, any future B and Bs must have private baths.
- Most B and Bs close down during the winter months and some B and Bs have no method of taking reservations during those months which also happen to be the months in which most tourists and tour operators are making summer vacation plans.

General Services and Infrastructure
- A lack of a municipal signage policy and good signage hampers the tourists’ ability to find attractions, accommodations, restaurants and other sites. An unsightly proliferation of signs has developed, particularly at the main intersection of town. This situation detracts from the overall scenic beauty of the area, which is the reason that many tourists visit Twillingate Islands.
- No heritage by-laws exist to protect the wealth of significant built heritage structures that are found in Twillingate and are important, and could be of greater importance, to the overall tourism product.

THREATS /BARRIERS

Threats or barriers are those events or occurrences over which a region has little or no control, but that could affect the tourism product. Outlined below are a few that are provincial, national or international in origin.

General comments
- World geo-political issues, declines in the North American stock market, increasing oil prices and a slow US economy will impact travel in the short-term.
Human Resources.

- A declining population base, an exodus of young people and minimal young people entering the tourism industry represent a serious barrier to developing ongoing sustainable tourism.

- Growing competition in the tourism industry, especially among locations where a coordinated effort among tourism operators has produced a product of quality and value, presents a threat to tourism development on Twillingate Islands if a plan and coordinated effort to implement that plan does not evolve.

OPPORTUNITIES

The existing tourism product on Twillingate Islands has been considered a ‘diamond in the rough” by the Department of Tourism, Culture and Recreation. In other words, the basic structure and product is good and does not need to be significantly altered, but rather enhanced. For the most part, it involves “tweaking” rather than substantial change. Most of the opportunities identified are based on knowledge of the market and recognition of weaknesses and gaps in the existing tourism product and marketing. Many of the opportunities have to do with a planned approach to tourism development; in other words “managing” the tourism product rather than haphazardly letting it happen. Other opportunities include enhancement of existing attractions (e.g. hiking trails, heritage buildings and the waterfront), better packaging existing sites and attractions (theming, interpreting, connecting, matching product to market), filling in service gaps so that they match market needs (e.g. more upscale B and Bs and high quality small inns, small upscale seasonal restaurants, bars and coffee shops) and improved municipal services to meet tourism demand (e.g. better signage, user friendly entrance to the town, a designated centre for all tourism information).
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*Cover photos from AMEC Earth & Environmental, Kittiwake Coast Tourism Association, Hillside Bed & Breakfast and Crewe's Heritage Bed and Breakfast.*
1.0 INTRODUCTION

Twillingate Islands, consisting of North and South Twillingate, are located in Notre Dame Bay, one of the most scenic bays on the island of Newfoundland’s northeast coast. Two incorporated communities are located on the islands: The town of Twillingate is on both the North and South Twillingate Islands and the town of Crow Head is on the most northern part of the North Island. One local improvement district and four unincorporated settlements are also located on the two islands.

As is the case with a majority of Newfoundland and Labrador coastal towns and communities, the communities of Twillingate Islands were built around the fisheries. During the 1800s the islands, with their numerous protected harbours and coves, gave rise to a strong inshore fishery. A central location and good harbours also resulted in the islands becoming an important stopover point for Newfoundland fishermen heading to Labrador for the summer fishery. Over the years, merchants arrived, the area prospered and many fine buildings were built. Later on the town of Twillingate gained prominence as a regional service centre that included a large regional hospital, thus providing additional employment in the area. During the mid to late 1900s both the Labrador and inshore fisheries declined and roads replaced water as the main source of travel and communications. The area experienced an economic setback that was only partially alleviated by the building of two causeways, the Lester Curtis Causeway connecting New World Island to mainland Newfoundland in 1973 and the Walter B. Elliott Causeway connecting the two islands to nearby New World Island in 1974. Today, the communities of Twillingate Islands face serious economic challenges, as do many of Newfoundland’s rural communities.

Twillingate Islands have been considered a provincial tourism destination for many years. The area’s scenic rugged beauty; numerous natural harbours, coves and islands; stately historic homes and merchant premises, and friendly people have long attracted visitors. Although some other Newfoundland communities have similar attributes, the Twillingate area has a combination of additional factors that make it a popular tourism draw. Tourists, tour operators and provincial tourism authorities know the area to consistently provide more provincial icons (i.e. icebergs, whales, living fishing village, lighthouse, music/food and culture) in one place than most other Newfoundland communities. Tourists can also go there and be assured of experiencing a genuine Newfoundland outport that is of sufficient size to offer accommodations, food, and activities as well as basic services such as a gas station, pharmacy, Laundromat, and grocery. Twillingate Islands are also strategically placed half way between St. John’s and the west coast and are, therefore, a convenient, worthwhile and scenic stop over point.

The Twillingate Islands are considered a sub-region of a larger area known as the Kittiwake Coast. As such, the Islands have been considered part of other strategies including the Northeast Coast Regional Tourism Strategy. (Randolph Group, 1991) In addition, two site-specific studies have been undertaken: the Feasibility Report, Twillingate Historic Fishing Village (Beaton Sheppard Associates Limited, 1997) and the Twillingate Heritage Assets Study (Avalon Consultants, 1998) and its companion piece, the Heritage Inventory of the Twillingate Islands. However, to date no integrated tourism strategy has been developed for the Twillingate Islands, and the Randolph Group study is more than ten years old. The Twillingate Historic Fishing Village concept depended on significant capital outlay by government that was never approved and, therefore, the concept plan has never been implemented. The Twillingate Heritage Assets Study forms a good tourism and cultural foundation upon which to build.
The Twillingate Heritage Assets Study indicates that a lack of both an overall tourism plan for the area and a cooperative team approach by local groups and individuals have hampered the development of tourism in the area. While Twillingate Islands have been considered a “diamond in the rough” by tourism authorities, other Newfoundland tourism locations (e.g. Bonavista, Newtown and Gambo), with some of the same comparable tourism attributes, have moved ahead because of united efforts to develop and implement a comprehensive tourism plan. As is shown in Table 1, the 1991 Northeast Coast Regional Tourism Strategy suggests seven major theme concepts, of which four have been implemented. A fifth was not because it duplicated an attraction at another site. Only Fogo and Twillingate have not implemented the suggested theme concepts for their area.

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<td>David Blackwood Gallery</td>
<td>Wesleyville or vicinity</td>
<td>Gallery section of the museum opened in 2001 with a special showing of a sample of David Blackwood's work.</td>
<td>Bonavista North Regional Museum Committee</td>
<td>Original home of David Blackwood</td>
</tr>
<tr>
<td>Archaeology</td>
<td>Cape Freels</td>
<td>No</td>
<td></td>
<td>Beothuk Interpretation Centre at Boyd’s Cove was a major factor (e.g. duplication)</td>
</tr>
<tr>
<td>Joey Smallwood Heritage</td>
<td>Gambo</td>
<td>Implemented in 1999</td>
<td>Smallwood Era Development Corporation</td>
<td>Major development included townscape improvements in Gambo, Joey’s Lookout on the TCH, trails, campground, Visitor Information Centre and Village Green Park where bronze statue of Joey Smallwood is located</td>
</tr>
<tr>
<td>Folk life Theme</td>
<td>Fogo Islands/Change Islands</td>
<td>No</td>
<td></td>
<td>Organizational Issues</td>
</tr>
<tr>
<td>Seal and Iceberg Ecology</td>
<td>Twillingate Islands</td>
<td>No</td>
<td></td>
<td>No overall Master Plan</td>
</tr>
<tr>
<td>Banting theme</td>
<td>Musgrave Harbour</td>
<td>Implemented over a series of phases (1997-2001)</td>
<td>Community of Musgrave Harbour</td>
<td>Upgrade of the municipal park, Banting Interpretation Centre, original Banting plane wreck and static display of replica of Banting plane (Hudson bomber)</td>
</tr>
</tbody>
</table>

Source: left column, Randolph Study, 1991; all other columns, AMEC.
In the past some attempts have been made to develop a common tourism approach for the area, but this has been hampered by an inability to build consensus among all tourism stakeholders while at the same time maximizing the expertise of professional tourism planners. In many ways, one of the biggest challenges facing the area will be developing a local consensus on the Master Plan and its implementation.

Despite the above issue, the time is right to attempt a Master Plan that is based on building strong area consensus and providing a practical implementation strategy to meet the plan’s goals and objectives. Given that Twillingate Islands are already a destination for many of the province’s tourists, and other similar areas such as Newtown, Ferryland and Bonavista have developed master plans, a systematic approach to tourism development on Twillingate Islands is critical. This will help in capturing a greater portion of the increasing numbers of tourists visiting Newfoundland and Labrador as well as the increasing number of domestic tourists who are touring the province. Perhaps most importantly, it will increase the number and yield of tourists as well as attractions and activities in a planned way that links market demand to product supply.

1.1 PURPOSE

The Twillingate Islands Tourism Association (TITA) has commissioned this study. The purpose of the Tourism Master Plan is to help Twillingate Islands increase its tourism visitation by strengthening its position as a provincial destination of choice through strategic tourism development of the cultural, heritage and natural assets of the two islands. The Plan is designed to match market interests with tourism product development (i.e. ensure that the Twillingate tourism product matches the interests of the majority of tourists visiting the area) and to rectify weaknesses in the existing tourism product through results-oriented and cost effective methods.

Specifically, the Plan is designed to achieve the following goals:

- Generate increased tourism visitations and resulting expenditures;
- Increase lengths of stay, extend the tourism seasons, and create sustainable tourism employment;
- Generate direct, indirect and induced economic activity throughout all parts of Twillingate Islands;
- Stimulate investment in the tourism industry and related sectors;
- Provide a plan for the appropriate development of key area Unique Selling Propositions’ (USP) products and assets;
- Identify major markets; and
- Provide quality product and service opportunities to meet market demand.

In addition, TITA wanted to achieve the following specific objects as they relate to the Plan’s methodology:

- Consultations with local community organizations to collect, synthesize, and analyze existing data and stakeholder information in a scientifically defensible manner for the formulation of the Master Plan as well as develop a common vision for the area which is acceptable to the majority of residents;
- Assess objectively the best and most strategic opportunities through inter-agency coordination, regional knowledge, understanding and cooperation;
Utilize existing zonal board, tourism association and other plans, where appropriate, as they relate to tourism to integrate existing projects and initiatives;

- Objectively assess opportunities that will have the greatest positive impact;
- Educate stakeholders and potential developmental/entrepreneurs in tourism principles and development, and
- Focus on strategies to achieve market ready products.

This Plan provides an analysis of a prioritized short list of major tourism opportunities that will have a positive economic impact on Twillingate Islands, especially in terms of job creation and on-going employment.

The proposed Plan provides a clear direction for Twillingate Islands' tourism for the next ten years with specific directions for the next three to five years. It describes the existing product, analyzes its weaknesses in terms of tourism demand, provides practical methods for strengthening and enhancing the product, and outlines how, by whom, when and at what general cost tourism opportunities should be developed. These recommendations complement and build on the provincial tourism strategy and are based on a thorough understanding of Twillingate Islands as well as the Kittiwake Coast tourism product including its people, their heritage and environment. The recommendations are also based on national and international tourism trends, comparative research of success factors in other appropriate jurisdictions and proven market analysis. All data gathered and analyzed will help TITA in developing destination development planning, attractions, regional marketing and inter-organizational communications and coordination. The Plan also focuses on practical, cost-effective and innovative policies and programs that can be implemented and will help position the Twillingate Islands tourism product, stimulate new employment opportunities and brand the area as a culturally and environmental exciting destination.

1.2 STUDY TEAM

This report has been prepared on behalf of TITA by AMEC Earth & Environmental Limited in association with the Economic Planning Group. The following individuals undertook the research and prepared the Master Plan:

<table>
<thead>
<tr>
<th>Susan Sherk</th>
<th>Project Manager, Product Development</th>
<th>AMEC</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Final Report Preparation</td>
<td></td>
</tr>
<tr>
<td>John Hull</td>
<td>Product Development</td>
<td>AMEC Associate</td>
</tr>
<tr>
<td>Jeana McGrath</td>
<td>Research</td>
<td>AMEC</td>
</tr>
<tr>
<td>Susan Mathieu</td>
<td>Destination Marketing</td>
<td>The Economic Planning Group of Canada</td>
</tr>
<tr>
<td>Gordon Phillips</td>
<td>Destination Marketing</td>
<td>The Economic Planning Group of Canada</td>
</tr>
</tbody>
</table>

This team has successfully worked together before on tourism strategies and have extensive national and international experience in product development, destination marketing and tourism planning.
1.3  ACKNOWLEDGEMENTS

AMEC and the Economic Planning Group would like to thank the Twillingate Islands Tourism Association for their invaluable help and direction. We are particularly thankful to Fred Bridger and David Thompson who provided regular and ongoing guidance. We would also like to thank the town of Crow Head for its hospitality and, in particular, John Hamlyn for all his arrangements at the Crow Head Community Centre. Each of the tourism operators on Twillingate Islands was most helpful in answering our numerous questions and, as always, the Department of Tourism, Culture and Recreation provided wise guidance.

1.4  APPROACH AND METHODOLOGY

In order to meet the objectives as stated in the Request for Proposals and the proposal itself, the following phased approach and methodology was undertaken.

Phase 1 – Markets focused on market demand and characteristics. It involved a review of available provincial tourism data on current and historic visitation patterns, and collection of information from tourism operators in the area. During this phase we also researched international, national and regional tourism market trends paying particular attention to the interests and expectations of travellers. More detailed research was conducted into a number of target market segments that were identified as being priorities for the Twillingate area.

Phase 2 - Products focused on the current state of tourism on the Twillingate Islands in order to determine the current situation with respect to the supply side.

Secondary research consisted of reviewing and analyzing previous tourism plans for the region in terms of what had and had not been implemented and why. Provincial tourism plans were also reviewed to determine how the Twillingate tourism product was and could be integrated with provincial plans. The Internet was also used in gathering secondary source data.

Primary research was conducted with Twillingate tourism operators as well as provincial tour operators to help determine the nature, scope, extent and market readiness of various Twillingate Islands’ tourism products and assets through an inventory of local attractions and activities, accommodations, restaurants, craft shops and associated support services. More than 35 Twillingate tourism operators were contacted, over 95% of them through personal interviews. Three Newfoundland and six mainland tour operators were interviewed as well as six provincial tourism government officials. A focus group of five tourists to Twillingate was also held in St. John’s. On January 27, 2003, a public tourism community workshop was held at the Crow Head Community Centre in which approximately 45 individuals participated in a two-hour session.

A variety of analytical tools (e.g. SWOT analysis and situation analyses) were used to determine: current supply of tourism products and service, market ready products and marketing strategies.

Phase 3 – Opportunity Identification consisted of integration of all data gathered using the various research tools, analysis of that data and the testing of various hypotheses among the key stakeholders. The outcome was a series of interrelated tourism opportunities for Twillingate Islands.
Phase 4 – Master Plan is the actual Tourism Master Plan for Twillingate Islands including a description of sub-island themes and attractions, transportation, accommodations and services, infrastructure and training as well as prioritization of the development of various products, analysis of market readiness, timetables and target markets, and a general costing.

1.5 FORMAT OF THE REPORT

Volume I consists of:
- an overview of the existing Twillingate Islands tourism product including attractions and activities as well as existing tourist services;
- an overview of tourism markets and market opportunities including a marketing overview, current tourism activity within the province, the market context for Twillingate Islands, market segments with potential for Twillingate Islands, and insights from the travel trade;
- previous tourism studies of Twillingate Islands and the status of those studies;
- lessons learned form comparable communities; and
- the strengths, weaknesses, opportunities and threats of Twillingate Islands regarding tourism.

Volume II consists of:
- a description of the building blocks necessary for creating a successful tourism destination;
- the overall strategic tourism approach for Twillingate Islands;
- product development opportunities including natural tourism and attractions, cultural tourism and attractions, tourist services, municipal and business development, human resources, market readiness and market development; and
- the marketing strategy for Twillingate including the importance of a marketing network, the actual marketing strategy and future research needs.

For ease of reading the two volumes have been bound separately and the appropriate appendices are attached to each of the volumes. The Executive Summary for Volume 1 is included in Volume 1 and the Executive Summary for Volume 2 is included in Volume 2. A separate volume consisting of a combined Executive Summary of each volume is also available.

1.6 DEFINITIONS AND DATA LIMITATIONS

A glossary of general tourism terms used throughout this Master Plan can be found in Appendix A.

According to Statistics Canada, the definition of tourism as adopted by the World Tourism Organization and the United Nations Statistical Commission is “the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.” Additionally, “visitors” are persons who undertake tourism, as defined in the previous sentence.

Visitors are referred to as either tourists (those who stay overnight or longer in the place visited), or excursionists (same day visitors). Both tourists and excursionists are individuals who travel 80 km or more to a destination.
Both tourists and excursionists are important to Twillingate Islands. For purposes of this study, a “real” or “hard” tourist is one who stays for several hours or a night and spends money. A “soft” tourist drives through without stopping, except perhaps to buy a drink or get some gas. It is the real or hard tourist who will be referred to and at whom this study is aimed.

No accurate method exists to document the number of tourists that annually visit Twillingate Islands because no single entry or exit point exists that has the ability to collect that information. The Twillingate, New World Island, Change Islands Development Association operates a visitor information centre at Newville, but acknowledges that it only captures a limited number of tourists heading towards Twillingate Islands. Therefore, only a range of the number of estimated tourists can be provided.

The information in this report has been assembled from a variety of primary and secondary sources. While we have tried to ensure within reason the accuracy of the information obtained for this plan, we have not verified all data provided to us for this plan.

1.7 LOCAL ISSUES AND CONCERNS TO BE ADDRESSED

A recent study (Avalon Consultants Inc., 1998) identified six challenges facing the Twillingate area that impact the tourism potential, at least five of which are still in evidence today. They are:

<table>
<thead>
<tr>
<th>1998 Issue</th>
<th>Description</th>
<th>Reason</th>
<th>Result</th>
<th>Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population decline</td>
<td>The population decreased by 7.6% between 1996 and 2001 and over 16% in ten years.</td>
<td>Cod moratorium, out-migration, trend towards smaller families, no new industry</td>
<td>Lower tax base, fewer businesses and services, fewer volunteers</td>
<td>New industry (e.g. tourism) to provide people with employment and a reason to stay</td>
</tr>
<tr>
<td>Shrinking tax base</td>
<td>Fewer residents and businesses to pay municipal taxes</td>
<td>Population decline and business loss</td>
<td>Lack of money for basic infrastructure, restoration projects, community services</td>
<td>New industry and increased population</td>
</tr>
<tr>
<td>Lack of sustainable jobs</td>
<td>Residents turn to government grants or out-migration</td>
<td>Limited employment opportunities</td>
<td>Creates friction, out migration</td>
<td>New industry and employment</td>
</tr>
<tr>
<td>Community friction</td>
<td>Deep divisions prevent area from working together towards common economic goals</td>
<td>Occurs as a result of local residents perceiving gov’t grants going to some groups/individuals and not to others and also being in competition with the private sector</td>
<td>Gov’t unwilling to fund projects as long as deep divisions occur within the communities</td>
<td>Need for community to agree on common economic/tourism goals</td>
</tr>
<tr>
<td>1998 Issue</td>
<td>Description</td>
<td>Reason</td>
<td>Result</td>
<td>Resolution</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------</td>
<td>------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Infrastructure</td>
<td>Lack of sufficient accommodations; proper restaurants, pubs &amp; live</td>
<td>Uneconomic during non-tourist season; poor</td>
<td>Increased drive-thru tourists; disgruntled tourists at lack of</td>
<td>Extend shoulder season, increase spending rate of individual tourists; tourism plan for signage</td>
</tr>
<tr>
<td>needs</td>
<td>entertainment, lack of good signage</td>
<td>signage, lack of coordinated effort</td>
<td>amenities</td>
<td></td>
</tr>
<tr>
<td>Lack of tourism</td>
<td>Piecemeal approach to tourism</td>
<td>Divisions within community</td>
<td>Other areas moving ahead</td>
<td>Tourism strategy</td>
</tr>
<tr>
<td>strategy</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Avalon Consultants identified the issues in the left column; the consultants of this report prepared the other columns.

Only one challenge has been addressed in the intervening five years, a lack of a coherent tourism strategy with a common destination-marketing concept. This strategy is an attempt to address that issue. Issues specific to infrastructure needs and community friction are described in 2.0 and Appendix B. Issues related to population decline, shrinking tax base and sustainable jobs should be at least partially addressed with the implementation of the Twillingate Islands Tourism Master Plan.
2.0 REGIONAL CONTEXT

2.1 INTRODUCTION

The regional context which includes the environmental setting, socio-economic profile, administrative and regional structures and associations, land use and infrastructure, human resource development, and transportation are covered in detail in Appendix B. Listed below are the main points of the regional context section that should be kept in mind when thinking about the Twillingate Islands Tourism Master Plan.

Environmental Setting
One of the strengths of the region’s tourism product is the number of icebergs that appear off the coast and northern bays of Newfoundland. The presence of easterly and north-easterly winds can strongly influence the number of icebergs that make their way onto the coast. The U.S. Coast Guard’s International Ice Patrol has monitored the number of icebergs crossing 48ºN (about 110 km south of Twillingate Islands) since 1914. Figure 1 in Appendix A illustrates the inter-annual availability of this total. Although the number of icebergs appearing off Twillingate’s coast in any given year is completely dependent on external factors, Twillingate Islands continues to be one of the most reliable places for iceberg viewing, assuming they exist off Newfoundland’s coast in any given year.

The other strength of the area is its exposed bedrock that consists primarily of material from an ancient ocean floor and a series of volcanic islands that formed approximately 480 million years ago. The area’s geological past has resulted in numerous coves, bays, inlets, harbours and islands that are picturesque tourist attractions. Other environmental indicators such as birds, vegetation, animal life, etc. are found elsewhere on the island of Newfoundland and, therefore, are not a unique selling proposition.

Socio-economic Profile

Twillingate has a vast, rich and varied history. Artifacts found in the area indicate that Dorset Eskimo and Maritime Archaic people inhabited the Islands as far back as 1500 BC. The Curtis site, located in Back Harbour, is a Maritime Archaic Burial Site excavated between 1966 and 1969. The Beothucks also inhabited the area and the Europeans began settling in the region in the 1700s. As Twillingate grew into a major commercial and service centre, the population increased reaching 3,500 by the mid 1850s. Twillingate remained a prominent service centre until roads replaced water in the 1960s as the main means of Newfoundland’s transportation system. The decline of the seal fishery in the 1980s and the inshore fishery in the 1990s also negatively affected Twillingate’s economic growth, as it did many other coastal Newfoundland communities. As a result of its former prominence, the town of Twillingate still has many fine homes and commercial establishments that are important tourist attractions. Today, the major employers are the hospital (130-140 people), the fish plant (120 people seasonally) and tourism (120 people seasonally). As a result of the decline in the inshore fishery, the population has decreased to less than 2,800.
Administrative and Regional Structures and Associations

Twillingate Islands belong to a number of organizations that are good partners for tourism development. They include the Kittiwake Economic Development Zonal Board; the Twillingate, New World Island, Change Islands Development Association; the Kittiwake Coast Tourism Association and the Twillingate Islands Tourism Association. The two municipalities on the Islands, Twillingate and Cow Head, are also supportive of tourism development for the area.

Land Use and Infrastructure

Tourism planning needs to be coordinated with appropriate design and land use plans. The two municipalities on the Islands have not yet enacted appropriate by-laws that would help in assuring that appropriate tourism development occurs. Tourism planning also needs to be coordinated with the carrying capacity of municipal infrastructures and services. The Islands appear to have sufficient services to accommodate planned tourism growth. Although not a service, the entrance to the town of Twillingate requires some proper planning if Twillingate Islands are to be a tourism destination.

Human Resource Development

No formal tourism programs exist in the area nor have many individuals availed of the many education and training services offered by Hospitality Newfoundland and Labrador. However, TITA offered an informal local tourism seminar each year 2002, 2001 & 2000. If Twillingate Islands are to become a major tourism destination, serious consideration of ongoing hospitality training will need to be taken by tourism operators.

Transportation

One of Newfoundland’s strengths as a tourism destination is also one of its greatest weaknesses, its geographical isolation. The transportation challenge for Newfoundland is mirrored on the Islands. The trunk roads between Gander and Twillingate and Notre Dame Junction and Twillingate are in poor condition. The Department of Works, Services and Transportation have said that Route 330 as far as Gander Bay and Route 340 between Fairbanks and Twillingate are listed as a priority for capital upgrades over the next five to eight years, depending on the availability of capital funds. Route 331 is a slightly lower priority, as it is not a trunk line.

3.0 EXISTING TOURISM PRODUCTS AND SERVICES

3.1 EXISTING TOURISM PRODUCTS: ATTRACTIONS AND ACTIVITIES

3.1.1 Natural Tourism Attractions And Activities

The following section outlines the existing natural tourism attractions and activities that Twillingate Islands have to offer. Natural attractions include anything that a tourist would be involved in related to the outdoors.

Hiking and Walking
Numerous hiking trails exist on Twillingate Islands. Some have evolved naturally over the years as a means of connecting houses, fishing stages, harbours and communities on the Islands; others have been cleared more recently as a means to reach points of scenic interest. More than 10 hiking trails have been upgraded. These are now described in a map of the area which is available in Xeroxed form for tourists. The map also includes some interpretation of the area and highlights particularly scenic points such as arches and rock formations representing people
and animals. Most of these trails are marked, but have limited interpretation and have not been upgraded to any standard. Numerous other trails exist, but are not clearly marked, interpreted or upgraded to any standard. Walks through the communities are not designated, marked or interpreted.

**Sea Kayaking**

No sea kayaking or sea canoeing facilities exist in Twillingate for rental or instruction. However, some provincial sea kayaking operators do bring tourists to Twillingate Islands to experience kayaking among the many sheltered and scenic islands of Notre Dame Bay.

**Boat Tours**

Boat tours have become integral to Twillingate Islands growing popularity as a tourism destination. These boat tours are taking advantage of Twillingate Islands’ position of providing one of the most consistent opportunities to see icebergs as well as capitalizing on the town of Twillingate calling itself the Iceberg Capital of the World. In 1984 the first tour boat began in Twillingate. Since then this operation has grown along the harbour to include a craft shop with an emphasis on iceberg related items. In 1997 two boat tour companies existed. In 2003, four are in operation, three proving larger boat service (e.g. 20 passengers) from Twillingate Harbour and one operating a smaller boat out of Back Harbour. At least two of the boat tour companies are planning on expanding their services on the waterfront.

**Cruise Ships**

In 2002, two cruise ships were scheduled to visit Twillingate Harbour, but only one arrived.

**Natural Rock Formations**

The rugged scenery of Twillingate Islands has inspired the imagination of residents and visitors for decades. There are many natural rock formations that have been identified as representational of people and animals. The profile of Queen Victoria is one of the most popular sites in Crow Head. Other formations include the Gorilla Face, Naked Man, Bear’s Head, and Cobra Snake. The natural rock arch in Lower Little Harbour is also a popular site for walking.

**Other**

No tourism facilities exist for or promote soft adventure experiences (e.g. biking, bird watching, wildflower viewing). Although pleasure vessels from other parts of Newfoundland and the world occasionally stop or overnight in Twillingate Harbour, no facilities especially built or geared to pleasure craft exist in Twillingate Harbour. No tourism facilities exist for hard adventure such as scuba diving.

### 3.1.2 Cultural Tourism Attractions and Activities

The following section outlines the existing cultural attractions and activities that Twillingate Islands have to offer. Cultural attractions and activities includes anything that a tourist would experience related to the arts: performing (music, theatre or dance), literary (writing and publishing), media (film and video) and visual (art and photography) as well as anything related to the local heritage including archaeology and genealogy, built heritage and museums and archives,
The town of Twillingate is itself a cultural experience in that it represents to tourists a living fishing village with a long, rich and varied history. It and other communities on the islands boast historic homes and commercial premises; colourful stages; interesting place names, and distinct coves and inlets.

Arts

Performing Arts
In 1996 the Fisher Players Dinner Theatre began performing for tourists with three performances weekly and reaching approximately 600 people by the end of the season. By 1997 the Players were performing five nights a week and reaching 1,600 people. The demand grew so quickly that by 1998, they performed six nights a week to a total of more than 2,000 people by season’s end. Although the name changed and some of the players, the dinner theatre under the new name of All Around the Circle Dinner Theatre has become a sought after tourism event. In 2002 the group performed six nights a week from June 10 to September 14 to more than 7000 people. Held in the refurbished Community Centre of Crow Head, the dinner theatre can accommodate 120 people nightly, but there are many times during the height of the tourism season that individuals are turned away. Formed by fish plant workers who were displaced after the 1991 cod moratorium, All Around the Circle Dinner Theatre has become a provincial success in part due to the energy, wit and professionalism of the untrained performers as well as their ability to consistently provide a good quality meal of local food. All Around the Circle is part of the Soirée and Times events that the Department of Tourism, Culture and Recreation promote.

Other groups and individuals perform throughout the summer on Twillingate Islands. Split Peas, a local singing group of eight women, has been performing traditional Newfoundland and folk music for tourists on a regular basis since 1993 at the historic Northeast Church Heritage Museum. Their name and approach to local music has made them a growing tourist attraction. At least once every other summer a play based on local history is performed at the North East Church. In 2002, the Split Peas and the Loyal Orange Benevolent Association (LOBA) also hosted ‘Touton House,’ a joint cultural venture of music and traditional food, in the Orange Hall at Twillingate North Tuesdays and Thursdays in July and August.

The Fish, Fun and Folk Festival has been running continuously each summer since 1980. Expanded from three to five days, it attracts thousands of Newfoundlanders and tourists each year. Like many of the province’s festivals, it offers opportunities to buy games of chance, crafts and food; listen to popular music groups and participate in dances. The Festival has always included a number of family activities including bonfires and fireworks. The majority of people attending are local, visiting friends and relatives or Newfoundlanders from other parts of the province.

Visual Arts
Ted Stuckless of Twilligate is one of Newfoundland’s many very talented artists. His studio and gallery, located in his father’s former general store on the main street of North Island, is open to tourists. Originals and copies of his work in oils, pen and ink and works by other artists are available on site to buy. Plans for expansion of his gallery are now being contemplated.

Through the ArtsSmart Project which is funded by the McConnell Foundation, Ted Stuckless began an art project with students from the JM Olds Collegiate High School in 1998 in which they painted murals on the walls of the school depicting the history of Twillingate Islands. Larger
than life, these murals wind their way through the hallways of the high school and have become a summer tourist stop. The town hall of Crow’s Head also contains a number of colourful murals by Melvin Sharpe depicting the cultural heritage of the community. Other buildings within the municipality of Twillingate such as the AGA Variety Store and Iceberg Boat Tours and Craft shop also have murals painted on them by Melvin’s son Jason Sharpe.

**Heritage**

**Archaeology**

At least six archaeology sites have been identified in the area indicating the presence of the Maritime Archaic, Palaeoeskimo culture; Dorset Eskimos, and some early Europeans. To date, no extensive archaeology excavation has occurred with the exception of a Maritime Archaic Burial site, known as the Curtis Site, in Back Harbour, that was excavated between 1966 and 1969 by archaeologist Don Macleod of Ontario. During that time, more than 1600 artifacts were tagged and collected and are now housed in the Museum of Civilization in Ottawa. As this is a burial site, the provincial government’s Department of Tourism, Culture and Recreation has no plans for further excavation at this site. No interpretation of the Back Harbour site or any other site on the Islands has been undertaken. Local residents are concerned that artifacts have and will continue to be taken from the area. The Twillingate Islands Pre/History Society, an organization of approximately 15 individuals who are interested in this period of history, have as their long term goal, the construction of an Interpretation/Education Centre placed in or near Back Harbour. Their short term goals are to preserve and protect the existing artifacts, undertake a preliminary archaeology survey, catalogue the artifacts that have already been discovered and submit a proposal to undertake a full-scale archaeological dig in Back Harbour that would lead eventually towards construction of an interpretation/education centre.

**Genealogy**

Many of Twillingate Islands’ residents can trace their families back three or more generations. Although no numbers are tracked, B&Bs report that a portion of tourists visiting the Islands each year come to trace their family genealogy. The Anglican Church library is used extensively for genealogical research. The Twillingate Museum has the cemetery records for all churches on Twillingate Islands plus some from New World Island.

**Built Heritage**

> All communities have a responsibility to preserve their built heritage so as to prevent it from being lost for all time. In Twillingate, history is part of everyday life, and is continuously visible in the existing architecture of the community. With proper attention this cultural inheritance, passed down from previous generations, can be preserved for generations yet to come, and in the process help instil a sense of pride and permanence in this historic town.

Avalon Consultants Inc. 1998

A recent study of the area (Avalon Consultants Inc., 1998) stated that “built heritage is always a major defining feature in determining the appeal of a cultural and heritage tourism destination. Heritage buildings and landscapes give a place history, substance and depth, can work consciously and unconsciously to make the visitor feel at home, engaged, enlightened and offer a host of other psychological and spiritual rewards.” The report explains that high quality
heritage buildings and landscapes (e.g. buildings, heritage trails and street scapes) are important for high-end niche markets, but only if they are authentic as opposed to reconstructed or manufactured.

According to another recent study (Sheppard et al, 1997), a number of different building forms exist throughout Twillingate Islands including houses, stores, fishing stages, barns, general store and a schoolhouse. The report concluded that a majority of these buildings are unoccupied, abandoned and in poor condition that no effort was being made to preserve these “valuable heritage structures”, and no heritage guidelines existed to protect these properties. Additionally, several buildings had been designated as historic buildings, but no effort had been made to preserve these structures. The situation remains the same today.

In 1998, the Heritage Foundation of Newfoundland and Labrador and Avalon Consultants conducted a Heritage Inventory of the Twillingate Islands as well as a Heritage Assets Study. 120 structures were identified as structures worthy of “further look”. Although the majority of these structures are private homes, many are commercial and public buildings, including three exceptional meeting halls, several merchant premises and church buildings. Among the 120 structures of note are: Ashbourne Shop, offices and home; Southside Methodist Church and Marshall Hall; Twillingate Masonic Hall; St. Peter’s Lodge SUF; Loyal Orange Association Lodge No. 5; Frank Stuckless Shop; Twillingate Museum; St. Peter’s Church Hall and Church; Hodge’s premises; Northside United Church, Women’s Institute, St. Andrew’s Sunday School and the Durrell Museum plus numerous homes in a variety of styles including the Queen Anne style Ashbourne home; the Georgian style Ashbourne house; the 19th century vernacular Loverridge House; the Victorian bracketed Frank Roberts House, and the Victorian gothic Ephram Jacobs house.

Two of the most popular built structures on Twillingate Islands are St. Peter’s Anglican Church and the Long Point Lighthouse. The church dates back to 1839, is open to the public, and houses a number of splendid old church related items such as the church bell tower and chandelier. Events such as organ recitals can be held in this large impressive structure. Located near it is the Twillingate Museum and craft shop making the area a small cluster of interesting and living heritage buildings to visit.

The Long Point Lighthouse, built in 1876, has become one of the Islands’ major icons along with icebergs and whales. Most tourists and all tour buses visiting the area travel to this lighthouse perched 300 ft above sea level at least once during their visit, as it is a good land point for viewing both icebergs and whales. The lighthouse is no longer commissioned, lies empty and is available for purchase by the local municipality of Crow Head. In 2000, TITA in association with the Department of Tourism, Culture and Recreation, Parks and Natural Areas Division, acquired a grant of $ 208,000 to upgrade and enlarge the parking lot, construct a viewing platform and a small three panel interpretation display of whales, birds and icebergs. A nearby house that once belonged to the lighthouse complex was leased in 1996 and has become the Long Point Interpretation Centre with some interactive displays and programs, a craft and small coffee shop. The Randolph Study of 1991 recommended that the Lighthouse be turned into a major regional attraction with an interpretative and viewing centre focusing on icebergs, seals, whales and local and marine flora and fauna. To date, only what has been described above has occurred.
Museums and Archives
The Twillingate Museum, Durrell Museum and Northeast Church Heritage Museum are important tourism attractions. The Twillingate Museum housed in the former St. Peter’s Church Anglican Rectory has been operating since 1973, has more than 12,000 people visiting it annually and has taken care to display local artifacts and materials in an organized and interpretative manner. The first floor brings visitors back in time to experience a grand Newfoundland outport house at the turn of the century complete with elegant dining rooms, fine parlour and a cosy kitchen. The study is used locally by visiting friends and relatives and by tourists as a place to browse through a number of books about the area, study the growing genealogical collection of local families histories or review the complete catalogue of headstones located on both Twillingate and New World Islands. A well-stocked craft shop is located at the rear of the building. Profits from the craft shop help defray operating expenses of running the Museum. The second floor focuses on famous people of the area such as Dr. John M. Olds and the some of the instruments he used and Georgina Stirling, known professionally as Marie Toulinguet, the international opera star. There is also a children’s room displaying some of the toys and clothing used by children at the turnoff the century.

The Durrell Museum, the former home of the Arm Lads Brigade (ALB) that operated for more than 50 years on Twillingate Islands, focuses on the ALB as well as the fishery. A major attraction is a large mounted polar bear that drifted into the community on an ice floe during the spring of 2000. The museum also sells locally made goods. Built in 1910 for the ALB, it opened in 1978 as a museum and was renovated and enlarged in 1998. More than 7800 individuals visit the Museum annually.

Northeast Church Heritage Museum is the original Methodist Church built in 1868. The church joined with the Congregationalist and Presbyterian congregations in 1925 to form the United Church. Due to dwindling numbers, the church was opened as a museum to visitors in 1988 as a memorial to the Christian citizens of the community. The Church Museum houses artifacts and related items of cultural significance. There are guided tours in July and August as well as concerts and performances that are performed six times in spring and summer. In winter the community holds its annual Christmas concert at the museum.

Heritage Attractions
Prime Berth is located at the end of Walter B. Elliott causeway connecting Twillingate to New World Islands. A private enterprise begun in 1995 by David and Christine Boyd, this living fishing premises where tourists can experience outport inshore fishing as it was 50 or more years ago has interactive demonstrations of cod splitting, cod traps and a sawmill as well as a fishing store, net loft and fishing stages. Each building contains countless well-maintained artifacts about the fishery and tourists have an opportunity to feed fish as well as ducks and other area wildlife. The quality of the experience has resulted in Prime Berth becoming a primary tourist attraction for tour operators and independent travellers attracting more than 72 bus tours and 10,000 people in 2002. Expansion plans include building a Fishing Gallery to house a growing number of archival photographs of the area and various types of fisheries.

Other Events and Attractions
In 1997, Winston Jennings opened Weil Winery Ltd. in the former elementary school in Durrell. Today the winery produces an array of wines made from local berries and plants such as partridgeberries, bakeapples, blueberries, strawberries, rhubarb, blackberries, cherries and plums. The winery produces more than 15,000 cases of wine annually and offers guided tours
to tourists. Future plans include improving the infrastructure, expanding the product line and installing a wine bar.

**Status of Attractions and Activities Since Previous Studies**

The primary attractions and activities in 1997 were the Long Point Lighthouse and the Twillingate Museum plus the *Fish, Folk and Fun Festival* for five days at the end of July. Other attractions and activities at that time included the North East Church Museum, Prime Berth, Long Point Interpretation Centre, and several boat tours. Despite an increasing number of tourists coming to the area, no new attractions or activities have been added to Twillingate Islands with the notable exception of the *All Around the Circle Dinner Theatre*.

The Randolph Group (1991), in suggesting anchor attractions for the entire Kittiwake coast, indicated that the Long Point Lighthouse should be the anchor attraction for Twillingate Islands. The first phase of that concept, paving of the parking lot, a viewing platform and hiking trail, was implemented in 2000.

The 1997 Fishing Village study suggested that ecotourism opportunities such as scuba diving had potential and that tourists were increasingly requesting kayaking and hiking opportunities. Since then scuba diving has not been promoted, but some sea kayaking operators use Twillingate Islands as a point of departure. At that time, hiking trails were not well developed, marked or promoted. This situation has improved with the production of maps and a basic booklet that identifies twenty trails on Twillingate and New World Island. There are new trails being cut and an increasing number of tourists are taking up the opportunity to hike. However, the trails are not market ready and the trail booklet needs to be upgraded.

Table 3 outlines the attractions that existed in 1997 and those that exist today.

<table>
<thead>
<tr>
<th>1997</th>
<th>2003</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long Point Lighthouse (1876)</td>
<td>Same</td>
</tr>
<tr>
<td>Long Point Interpretation Centre &amp; Tearoom</td>
<td>Same</td>
</tr>
<tr>
<td>(1996)</td>
<td></td>
</tr>
<tr>
<td>Twillingate Museum and Craft Shop (1973)</td>
<td>Same</td>
</tr>
<tr>
<td>Durrell Museum (1978)</td>
<td>Same (expansion in 1998)</td>
</tr>
<tr>
<td>Northeast Church Museum (1988)</td>
<td></td>
</tr>
<tr>
<td>Prime Berth (1995)</td>
<td>Same (expanded)</td>
</tr>
<tr>
<td>Fish, Fun &amp; Folk Festival (1980)</td>
<td>Same</td>
</tr>
<tr>
<td>Twillingate Island Boat Tours and Iceberg shop</td>
<td>Same</td>
</tr>
<tr>
<td>(1984)</td>
<td></td>
</tr>
<tr>
<td>Twillingate Adventure Daybreak Tours (2000)</td>
<td></td>
</tr>
<tr>
<td>Oceanview Boat Tours (2001)</td>
<td></td>
</tr>
<tr>
<td>Iceberg Quest Tours (2002)</td>
<td></td>
</tr>
<tr>
<td>Fishers Players Dinner Theatre</td>
<td></td>
</tr>
<tr>
<td>Twillingate Island Guided tours</td>
<td>All Around the Circle Dinner Theatre (1999)</td>
</tr>
<tr>
<td>Examples of late 19th and early 20C architecture, a number of which are designate historic buildings.</td>
<td>Same</td>
</tr>
</tbody>
</table>
3.2 EXISTING TOURIST SERVICES

3.2.1 Accommodations

In 1997, a combined total of 48 accommodation units were available on Twillingate Islands with an additional four cabins for a total of 52 rooms. Based on the assumption of two visitors per room, a total of 104 visitors could be accommodated on any given night during the tourism season. By 2002, this figure had increased to 66 rooms. Based on the assumption of two visitors per room, a total of 132 visitors can now be accommodated on any given night during the tourism season.

Table 4 – Accommodations in Twillingate

<table>
<thead>
<tr>
<th></th>
<th>1997</th>
<th>2002</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motel</td>
<td>48</td>
<td>22</td>
</tr>
<tr>
<td>Bed and Breakfast</td>
<td></td>
<td>34</td>
</tr>
<tr>
<td>Cabin units</td>
<td>4</td>
<td>10</td>
</tr>
<tr>
<td>Total No. of Accommodation units available*</td>
<td>52</td>
<td>66</td>
</tr>
</tbody>
</table>

Source: middle column, Beaton Sheppard Associates Limited 1997; all other columns, AMEC.

*Kelsies Inn has indicated that it will expand to a total of 12 rooms by 2004.

Additionally, the Peyton Woods RV Park in Back Harbour has 22 serviced and 10 unserviced lots.

No outfitting lodges or high-end inns or hotels operate on the Islands.

The existing B & Bs (six), small inns (two), cabins (two), one motel and one RV park experienced unprecedented bookings last year with all of them citing anywhere from 10-33% increase over the preceding year. More than 4500 individuals were accommodated in the 10 B & Bs, inns and cabins. An additional 5000 were accommodated at the Anchor Inn Motel and the Peyton Woods RV Park. Approximately 65% of the tourists staying at the B & Bs, inns and cabins were from mainland Canada with most of them coming from Ontario; 15% came from the United States; approximately 14% came from Newfoundland, and 7% from elsewhere (e.g. Europe). Visitors from the United States and Europe were significantly down with the exception of the RV Park where approximately 40% came from the United States. The Park also experienced an increase in visitors from British Columbia. Over the past few years, the length of stay has increased from one to two or more nights, particularly at the B & Bs. Repeat customers average between 10-15%.

With the exception of one of the accommodations, all are family owned and operated including the Anchor Inn. The only accommodations to stay open year round are the Anchor Inn and Kelsies Inn. The B & Bs generally open in mid-May and close around mid or late September.

1 This figure does not include information from one of the ten accommodations.'
One B & B takes travellers throughout the year on an “as need” basis. Most of the B & Bs have an average of three rooms, some of which have attached bathrooms. None of the B & Bs plan to expand their operations within the next five years, except to undertake general improvements to the property and house. Change of ownership or perhaps closing the operation will occur for some within the next five years. Kelsies Inn expects to increase the number of rooms from 5 to 12 within the next two years and the Anchor Inn is contemplating an expansion. All of the B & Bs cater to the independent traveller or to tourists who are booked on a self-drive tour through a tour operator company. The Anchor Inn caters to these same travellers as well as to small motor coach bookings and business travellers. The Harbour Lights Inn with its nine rooms caters to small tours and groups as well as to the independent traveller.

Few motor coach or small tour operators overnight in Twillingate because it does not fit their 7 or 14 day package tour of the province. For the majority of these operators, Twillingate works well as a day tour and it most likely will continue that way in the future, even if increased attractions or activities existed. Only two out of nine tour operators contemplated Twillingate as an overnight stay in the future, and then only for a few select niche groups.

Given the recent increased length of stay in Twillingate by the independent traveller and assuming that the tourism product in the area will increase in quality, attractions and activities, one can expect an even greater increased demand for accommodations in the future, especially for B & Bs and small inns, but also for RVs, cabins and hotels/motels. At present, most B & Bs are fully booked throughout the tourism season. A shortage of accommodations, especially high-end properties, has become a serious deterrent to tourism growth in the area.

Business travellers overnight in Twillingate depending on the nature of their business. As an example, businesses involved in the fish plant or the hospital or a government official having more than one meeting in Twillingate will stay in the area. However, a business representative with more than one visit to make in Northeast Newfoundland will often stay in a more convenient location such as Gander or Grand Falls. This situation is unlikely to change in the future.

### 3.2.2 Restaurants and Other Tourist Services

Four restaurants operate in Twillingate: R & J Restaurant, Mary Brown’s, Golden Restaurant and the Anchor Inn, which is the same number of restaurants in operation in 1997. The total seating capacity is 326 and total employment is seven full-time, 15 part-time and seven seasonal. Additionally, the former Legion located on the highway outside of Twillingate caters to weddings and special events and North 99, a bar in Twillingate contracts out its space, but does not provide food. *All Around the Circle*, the local dinner theatre, offers a pre-set meal to approximately 120 people six nights a week throughout the tourism season (mid-June through mid-September). The Long Point Interpretation Centre and craft shop sells coffee and bakery items to visitors. A new restaurant is slated to open in the spring of 2003. None of the restaurants indicates any plans for expansion in the immediate future. Each of the restaurants is open year round catering to the local population, but each considers tourists important to maintaining a profitable bottom line.

Four clubs are located within or near the municipality of Twillingate. With the exception of the Anchor Inn Motel, all focus on the local market and offer entertainment typical of many rural communities such as bingo, darts, and gambling machines. Occasionally tourists visit them in the summer months and one club is contemplating catering more to the tourist market. No
 upscale or small bar exists that reflects the interests or income of the Twillingate tourism market segments.

3.2.3 Craft Shops

Craft shops are integral to a successful tourism product as it’s one of the major ways, other than food, accommodations and entrance tickets, in which a tourist spends money. With the advent of special events celebrations such as Cabot 500 and Soiree ’99, a positive turn in the general economy and targeted marketing, particularly at the Ontario market, more people are visiting the province for business and pleasure. Since most tourists buy something to remind them of their visit, demand has increased for quality locally made products that reflect the province’s culture, heritage and environment. Twillingate has some very fine craft shops, including the Twillingate Museum and Craft Shop. Operating since 1973, has established a well-recognized standard in display and buying. Recently, other attractions such as the Iceberg Craft Shop, the Long Point Interpretation Centre, Durrell Museum and Prime Berth have begun selling crafts. While some duplicate items are sold in each of the shops, other items are particular to an attraction such as the iceberg related items sold at the Iceberg Craft Shop. Additionally, the Green Thumb Nursery, the pharmacy and the Hospital gift shop sell gift items. Ted Stuckless Studio that showcases one of Newfoundland’s many talented artists also sells some work of other individuals.

3.2.4 General Services and Infrastructure

All of the general services found in most small towns that are important for tourists are available in Twillingate including grocery, hardware, building supplies, automotive and electronic stores as well as a bank, Laundromat, liquor store, post office, service station, trailer dumping station and hair salon. Twillingate also has a well-equipped regional hospital, police, ambulance, fire department and dentist as well as the accommodations and restaurants discussed in 3.2.1 and 3.2.3. The existence of these amenities and services has been a value added convenience for many tourists. With the addition of a few more services as well as enhancements of existing ones, tourists, especially those who are independent travellers, would be more inclined to spend more than one night.

In 1997 public washrooms were limited to some of the attraction sites, accommodation facilities, restaurants and Laundromat/shower facilities. Gas stations did not have public washrooms. In 2003, this situation remains unchanged and is considered a deficiency by most tourists.

In 1997, improvements were made to Route 340 from the main intersection of Twillingate to the base of Long Point Lighthouse. However no other road improvements within the two municipalities have been made since that time.

4.0 TOURISM MARKETS AND MARKET OPPORTUNITIES

4.1 OVERVIEW

4.1.1 The Global Tourism Industry

The world’s tourism industry saw strong growth through the mid 1990s and early into the new century and projections for the future were for continued growth. However, the combination of terrorism and international geopolitical uncertainties, along with declining economies in many
western countries, led to overall declines in global international travel during 2001 and 2002. A rebound in international travel is not expected until the uncertainties associated with Iraq and North Korea, as well as threats of terrorism, diminish.

Assuming that the geo-political situations are resolved, projections are that international travel activity will begin to rebound later in 2003 and in 2004. However, airlines will continue to face major challenges and there are expected to be more shake-outs in this sector of the travel industry over the next year or so.

Canada is expected to fare relatively well as the US economy, and that of our other key markets, improves. Recently released CTC forecasts suggest an increase in international travel receipts of 4.3% in 2003, and higher increases through 2006.

4.1.2 Tourism in Canada

Tourism in Canada is worth some $52 billion in total tourism expenditures and was responsible for creating 577,000 jobs in 2001. Table 5 provides a summary of the performance of Canada’s tourism industry for the past few years.

Over the past three years, international tourism activity in Canada has increased albeit with some periods of decline caused in large part by a slowing in economic growth in North America during late 2000 and 2001, and the events of September 11, 2001.

Domestic tourism activity (travel by Canadians within Canada) reached over 83 million overnight person trips in 2000, of which almost 80% were trips taken within the province of residence. Some 17 million overnight person trips were taken by Canadians to other provinces. These included trips for business, pleasure and to visit friends and relatives. Domestic travel declined in 2001, reaching only 74 million person trips of which 15.5 million were to other provinces. Although no data is available for 2002 on overall domestic travel in Canada, it appears from provincial statistics that there has been an increase in visitor volumes and/or spending, at least in Atlantic Canada.

International visitors made 19.6 million overnight trips to Canada in 2001, about the same number as in 2000, and up slightly from 1999. The majority, (80% or 15.6 million) of overnight international trips were from the United States. Some 4 million person trips were made to Canada from Other Countries – 21% from UK, 10% from Japan; 8% from each of Germany and France and the balance from a range of other countries.

The first part of 2002 saw continued declines in international travel to Canada (declines had begun in early to mid 2001) but by the end of the year, overall international visitation was up 1.8% over 2001(Note however that some of this increase is a reflection of the decline that occurred in visitation in Sept/Oct 2001). The strongest growth has been in US travel to Canada by auto – up 7.3% during 2002 over 2001.
Table 5 - The Performance of Canada's Tourism Industry, 1996 – 2001
(Millions; Overnight Trips Only and Percentage Change from Preceding Year)

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<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Within own Province</td>
<td>59.51</td>
<td>59.40</td>
<td>66.44</td>
<td>58.28</td>
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<tr>
<td>To Other Provinces</td>
<td>14.90</td>
<td>15.16</td>
<td>16.99</td>
<td>15.57</td>
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<td>Total Domestic</td>
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<td>65.727</td>
<td>74.409</td>
<td>83.33</td>
<td>73.86</td>
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<tr>
<td>(1996) (-8.2%)</td>
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<td></td>
<td></td>
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<td>(1997) (+13.2%)</td>
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<td>(1998) (+0.2%)</td>
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<td>(2000) (+11.8%)</td>
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<td>(2001) (-11.4%)</td>
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<td>International</td>
<td></td>
<td></td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>United States</td>
<td>12.91</td>
<td>13.40</td>
<td>14.89</td>
<td>15.18</td>
<td>15.225</td>
<td>15.589.5</td>
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<tr>
<td>(-0.7%)</td>
<td>(+3.8%)</td>
<td>(+11.1%)</td>
<td>(+1.9%)</td>
<td>(+0.3%)</td>
<td>(+2.4%)</td>
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<tr>
<td>Overseas</td>
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<td>U.K.</td>
<td>0.691</td>
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<td>0.747</td>
<td>0.780</td>
<td>0.866</td>
<td>0.826</td>
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<tr>
<td>(+7.8%)</td>
<td>(+6.2%)</td>
<td>(+1.8%)</td>
<td>(+4.5%)</td>
<td>(+10.9%)</td>
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<td>Germany</td>
<td>0.447</td>
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<td>(+6.3%)</td>
<td>(-11.1%)</td>
<td>(-4.8%)</td>
<td>(+3.6%)</td>
<td>(-1.9%)</td>
<td>(-12.5%)</td>
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<tr>
<td>France</td>
<td>0.459</td>
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<td>0.414</td>
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<td>(+6.8%)</td>
<td>(-4.4%)</td>
<td>(-8.5%)</td>
<td>(+3.0%)</td>
<td>(-2.4%)</td>
<td>(-11.8%)</td>
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<tr>
<td>Japan</td>
<td>0.648</td>
<td>0.566</td>
<td>0.484</td>
<td>0.526</td>
<td>0.500</td>
<td>0.410</td>
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<td>(-14.4%)</td>
<td>(+6.6%)</td>
<td>(-3.1%)</td>
<td>(-18.0%)</td>
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<tr>
<td>Other</td>
<td>2.132</td>
<td>2.098</td>
<td>1.923</td>
<td>2.085</td>
<td>2.237</td>
<td>2.105</td>
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<tr>
<td>(-1.6%)</td>
<td>(-8.3%)</td>
<td>(+8.4%)</td>
<td>(+7.3%)</td>
<td></td>
<td></td>
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<tr>
<td>Total International</td>
<td>17,285.2</td>
<td>17,636</td>
<td>18,828</td>
<td>19,367</td>
<td>19,617</td>
<td>19.6</td>
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<tr>
<td>(+2.1%)</td>
<td>(+2.0%)</td>
<td>(+6.8%)</td>
<td>(+2.9%)</td>
<td>(+1.3%)</td>
<td>(-0.03%)</td>
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</tbody>
</table>

Source: Canadian Tourism Commission; Statistics Canada; Note that changes in methodology with respect to the Canadian Travel Survey means that data on domestic travel from the earlier years is not directly comparable to later years.

The Canadian Tourism Commission is forecasting that tourism activity in Canada will increase in 2003 and 2004. Their Strategic Plan identifies a number of directions and priorities including:

- Product development in outdoor tourism, culture tourism, winter tourism and touring and cities tourism product areas
- Product development in niche product areas such as learning vacations, Aboriginal culture, golf, gardening, cuisine, and wellness vacations
- More focus on marketing to Canadians to travel within Canada
- A more aggressive marketing effort targeting the US market and,
- More investment in Internet marketing

4.1.3 The Outlook for the Future

Despite recent declines in overall global tourism activity, long term trends indicate that travel and tourism activity will continue to increase, assuming no long term impacts from current world geo-political issues. This future growth will be driven in part by the large North American aging baby boomer population which, as it reaches the empty nest and retirement lifestages, will have more time to indulge in travel – an activity that has always been important to them. Other
factors influencing long term growth in tourism activity include a loosening of travel restrictions and growing prosperity in countries with large populations, particularly China; improvements in aircraft design and airline economics resulting in lower long-haul travel costs (which is to some degree being offset by rising costs and inconveniences associated with security), and more aggressive marketing by numerous destinations around the world seeking foreign exchange revenues from international travellers. In the US, the leisure travel market has been slowly recovering with increases in the first half of 2002. However, business travel continued to decline and air travel is also continuing to decline.

World geo-political issues, declines in the North American stock market, increasing oil prices and a slow US economy are clearly going to impact travel in the short term, at least. It is evident from travel patterns in 2002 that North Americans are seeking closer-to-home, English-speaking, safe destinations and that there has been a resurgence in auto travel (AAA auto clubs in parts of the US are reporting significant increases in requests for their Trip Tik’s, used for driving trips). As well, leisure travellers are taking shorter, more frequent trips and the advance planning time is much shorter than it has been in the past. Preliminary indications are that this pattern will continue in 2003 with some US tour operators reporting much lower than usual interest in overseas destinations.

These short-term trends bode well for travel activity from the US to Canada, and for Canadians to travel domestically rather than to the US or overseas. A CTC Tourism Intelligence Bulletin (Issue 9: October 2002), reports a Harris Interactive study that indicates that world events have changed American preferences regarding countries they would most like to visit – Canada has jumped from ninth to fourth place, with Australia in first place, Great Britain in second place and Italy in third place.

Canada is perceived as a safe destination, close, and accessible by car. Atlantic Canada has already, and will likely continue to benefit from this trend. Auto arrivals into Newfoundland and Labrador from the US were up 10% in 2002; US arrivals into Nova Scotia to the end of November were up 10% over the same period in 2001 and PEI visitation from New England increased over 8%.

4.2 CURRENT TOURISM ACTIVITY IN NEWFOUNDLAND AND LABRADOR

4.2.1 Non-Resident Tourism Activity

Visitation and Spending Levels

Over the past seven years there have been substantial increases in non-resident tourism activity in Newfoundland and Labrador with total visitation climbing from some 305,000 in 1996 to almost 428,000 in 2001. Final data for 2002 is not yet available but preliminary information indicates further increases.

Table 6 below, based on data provided by the Department of Tourism, Culture and Recreation, provides annual non-resident visitation numbers and total spending for both the June through September period and the year as a whole for 1995 through 2001.
**Table 6 - Total Non-Resident Visitor Activity in Newfoundland and Labrador**

<table>
<thead>
<tr>
<th>Year</th>
<th>Peak Season Activity (June- Sept)</th>
<th>Annual Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td># of Visitors</td>
<td>Percent Change</td>
</tr>
<tr>
<td>1995</td>
<td>167,898</td>
<td></td>
</tr>
<tr>
<td>1996</td>
<td>154,541</td>
<td>-7.9%</td>
</tr>
<tr>
<td>1997</td>
<td>195,360</td>
<td>26.4%</td>
</tr>
<tr>
<td>1998</td>
<td>198,014</td>
<td>1.4%</td>
</tr>
<tr>
<td>1999</td>
<td>218,874</td>
<td>10.5%</td>
</tr>
<tr>
<td>2000</td>
<td>225,056</td>
<td>2.8%</td>
</tr>
<tr>
<td>2001</td>
<td>228,194</td>
<td>1.4%</td>
</tr>
</tbody>
</table>

Source: *Resident Automobile, Air & Cruise Visitor Statistics, April 2002; EPG Analysis.*

(These data are estimates developed by the Department of Tourism, Culture and Recreation using a variety of sources of information such as Marine Atlantic traffic counts, air passenger arrivals, and Canadian Travel Survey data.)

While visitation increased by some 40% between 1996 and 2001, visitor spending increased by over 75% reaching almost $290 million. Average spending per person is $618 during the peak season, and $676 on an annual basis. Spending by visitors arriving by air is some 55% - 60% higher than it is for those arriving by automobile. During the 1996 to 2001 period, air arrivals increased by almost 40% with auto arrivals increasing by roughly 30%.

**Preliminary Results for 2002**

Preliminary data for 2002 indicates a significant increase in arrivals by auto on the Marine Atlantic Ferry system but a decline in air arrivals, as follows:

- Non-resident auto visitors on Marine Atlantic ferries increased 14% in 2002, compared to the same period in 2001. Arrivals from all destinations were up, some significantly as follows:
  - The Maritimes – Up 8%
  - Ontario – Up 20%
  - Quebec – Up 29%
  - Western Canada – Up 27%
  - US – Up 10%

- Direct international arrivals at St. John’s airport increased 11% in 2002 (note however, that a significant portion of this increase was arrivals from St. Pierre & Miquelon)

- Visitors to Provincial information chalets increased 15%

- Cruise ship passenger visits increased 4%

- Airport passenger movements at the 6 major airports declined 7% for the January to November period
o Hotel occupancy rates (major properties) in St. John’s decreased 1% for the January to November period

Visitation at almost all Provincial Museums and Provincial and National Historic Sites in the province was up, and we anticipate that this was due in part to the increase in tourism activity in 2002.

o Provincial Historic Sites – total visitation (10 sites) up 45%; biggest increases at Cape Bonavista Lighthouse (the restoration of the lighthouse was finished in Spring 2002 so this likely contributed to the increase), Mockbeggar Plantation, Ryan Shop Mercantile Building. Increases were below average at Boyd’s Cove, Heart's Content Cable Station and the Trinity Interpretation Centre.

o Gros Morne National Park – vehicles up 2%; camper nights up 7.2%

o National Historic Sites – attendance up at almost all sites; largest increases at Cape Spear (the new visitor centre may be a factor here), Hawthorne Cottage, Ryan Premises and L’Anse Aux Meadows

The more significant increases in visitation appear to have been at facilities in the Avalon Peninsula and in western Newfoundland, both of which are major destinations for visitors to the province. Although there is no data available to substantiate this hypothesis, we suspect that there is an increasing tendency for visitors to the province to select either the Avalon/Eastern Newfoundland or Western Newfoundland as their trip destination, rather than attempting to see the entire province.

Visitor surveys, both in Newfoundland and Labrador and in other provinces, have indicated that those on pleasure/vacation trips have much higher levels of participation in activities such as visiting museums and historic sites than those travelling to visit friends and relatives. And visitors travelling from further away are more likely to participate in these types of activities.

As such, the significant increases in visitation levels at the various historic sites, combined with the increases in long haul traffic (e.g. US, Western Canada) reported by Marine Atlantic suggests that there may have been a significant increase in pleasure travellers to Newfoundland and Labrador in 2002. The proportional increase in pleasure travellers is likely higher than the overall increase in visitors (total visitor statistics include business travel and persons visiting friends and relatives).

Newfoundland and Labrador appears to have benefited not only from the trend to “closer to home” travel discussed above but also from the profile gained through the media coverage associated with the province’s efforts in association with the September 11 terrorism attacks, and from events such as the Juno awards.

**Visitor Characteristics**

These visitor characteristics are based on the results of the 1997 Visitor Exit Survey; the most recent such survey conducted by the provincial Department of Tourism, Culture and Recreation. Caution should be used in reviewing this data, since 1997 was an unusual year due to the Cabot Celebrations, and also since it is now five years ago – as such, the profile of visitors may well be quite different in 2002.
Purpose of Trip (June to September)

- Vacation/Pleasure: 41.4%
- Visiting Friends/Relatives: 37.3%
- Conventions/Conferences: 6.6%
- Other Business: 10.4%
- Other: 4.2%

Note that convention/conference may well be a lower proportion of June to September business now since Cabot Celebrations generated much higher than average conference/convention activity in 1997.

Visitor Origins (Year round)

- Maritime: 24% - 18% Nova Scotia
- Ontario: 38%
- Quebec: 5%
- Western Canada: 14%
- United States: 14% - New England, Mid-Atlantic, South Atlantic – each about 2.5%
- International: 5%

Trip Characteristics

- Average party size – 2.7 for auto; 1.5 for air (this is influenced by single-person business trips)
- Average length of stay – 11 nights for auto; 9.4 nights for air

Socio-Demographic Characteristics

Auto:
- 34% over 55 years; 45 – 54 years, and 35 – 44 years, each 23%
- Household income over $100,000 – 15%; $70,000 to $100,000 – 22%; $50,000 - $70,000 and $30,000 to $50,000, each 27%

Air:
- 24% over 55 years; 45 – 54 and 35 – 44 years, each 25%
- Household income over $100,000 – 25%; $70,000 - $100,000 – 26%

Activities Participated In

- The most popular activities reported by visitors surveyed in the 1997 Exit Survey were:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Air Visitors</th>
<th>Auto Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sightseeing/Tours/Scenic Touring</td>
<td>75%</td>
<td>86%</td>
</tr>
<tr>
<td>Viewing the Sea Coast/Ocean</td>
<td>84%</td>
<td>93%</td>
</tr>
<tr>
<td>Visiting Historic Sites or Museums</td>
<td>70%</td>
<td>74%</td>
</tr>
<tr>
<td>Nature Viewing</td>
<td>49%</td>
<td>64%</td>
</tr>
<tr>
<td>Whale Watching</td>
<td>37%</td>
<td>50%</td>
</tr>
<tr>
<td>Festivals and Events (NB 1997 was the Cabot)</td>
<td>45%</td>
<td>49%</td>
</tr>
</tbody>
</table>
In 1998, there were 2.3 million person trips made by residents of Newfoundland and Labrador within the province. This includes both same day trips (over 80 km distance one way) and overnight trips, as well as trips for all purposes – pleasure, visiting friends and relatives, business and personal reasons. Approximately 50% of these trips were same day trips and 50% were overnight trips.

By 2001, the most recent year for which data is available from the Canadian Travel Survey, resident travel within the province had increased to 2.9 million trips. Some 55% or 1.6 million trips were same day trips and 45% or 1.3 million were overnight trips. Trips for pleasure and to visit friends and relatives represented almost equal proportions of total overnight travel, with the balance of the trips for business and personal reasons. Staying with friends and relatives was the most important type of accommodation used. Data on trip expenditures indicates average spending per person of $90 on same-day trips and $210 on overnight trips.

The resident travel market represents an important market for many tourism destinations and businesses within the province since it is available year round. In fact, in 1998, 38% of the overnight resident travel occurred in the third quarter, with the balance fairly evenly split between the other three quarters of the year.

### 4.3 TOURISM ACTIVITY IN TWILLINGATE

#### 4.3.1 Tourism Activity in the Gander/Twillingate to Terra Nova Zone

An indication of the volume of visitors in the region, relative to visitors in the St. John’s area, can be obtained from data collected during the 1997 Exit Survey. This data provides information on the proportion of total visitor nights spent in Newfoundland and Labrador that were spent in each Economic Zone. In 1997, Twillingate was within Economic Zone 14, stretching from the Gander/Twillingate area east to Terra Nova. Table 8 summarizes relevant information from this analysis for both air and auto travellers, with a comparison to the St. John’s area.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Air Visitors</th>
<th>Auto Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Celebrations)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hiking</td>
<td>35%</td>
<td>50%</td>
</tr>
</tbody>
</table>

**Table 8 – Tourism Activity in the Gander/Twillingate to Terra Nova Zone**

<table>
<thead>
<tr>
<th>Gander/Twillingate to Terra Nova</th>
<th>Air</th>
<th>Auto</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent of Party Visits</td>
<td>18.2%</td>
<td>36.9%</td>
</tr>
<tr>
<td>Percent of Party Nights</td>
<td>8.1%</td>
<td>11.7%</td>
</tr>
<tr>
<td>Average Stay</td>
<td>4.1 days</td>
<td>3.2 days</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>St. John’s</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent of Party Visits</td>
<td>70%</td>
<td>47.4%</td>
</tr>
<tr>
<td>Percent of Party Nights</td>
<td>40.7%</td>
<td>18.6%</td>
</tr>
<tr>
<td>Average Stay</td>
<td>5.3 days</td>
<td>4.0 days</td>
</tr>
</tbody>
</table>

Note: The Gander/Twillingate/Terra Nova zone was one of four destinations in the province (St. John’s, Gros Morne Area and Corner Brook) that accounted for almost half of all the nights spent by auto tourists, and 60% of the nights spent by air tourists, in the province. In fact, the Gander/Twillingate/Terra Nova
zone accounted for the second highest percentage of party nights in the province for both air and auto tourists. Note that many visitors to the province visit more than one zone so the information reflects multi-zone visits and stays.

This data must be viewed with caution since most of the accommodation in the region is located in the Gander area and, as such, this area likely captures the most significant portion of the overnight demand identified in the table above.

4.3.2 Tourism Activity in Twillingate

No accurate method exists of determining the number of individuals who visit annually Twillingate Islands since no separate gateway has been established to capture that information. The only way to determine the number of tourists visiting the area with some measure of accuracy is to assume that a majority will visit at least one of the major local tourist sites. The Twillingate Museum and Craft Shop registered approximately 12,000 visitors in 2002, which was up 15% from the previous year. The Long Point Interpretation Centre registered 6,278 in 2002, up 28% from 2000’s number of 4,502. Prime Berth Fishing Premises indicates that approximately 10,000 individuals visited the premises in 2002 including 72 tour buses. This figure was up substantially over previous years.

Previous studies indicate anywhere between 12,500 and 20,000 people visited the area annually, but with no sources provided for those figures.\(^2\) If one assumes that:

- previous studies were correct,
- recent indications of an increase in the number of tourists visiting the area is correct,
- not everyone signs registration books at local sites, and
- not everyone visits local sites,

Then one could safely assume that approximately 20-25,000 people visited Twillingate in 2002.

However, caution should be exercised in using these figures as a basis for building a tourism industry on Twillingate Islands. According to Statistics Canada, the definition of tourism as adopted by the World Tourism Organization and the United Nations Statistical Commission is “the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.” Additionally, “visitors” are persons who undertaken tourism, as defined in the previous sentence. Visitors are referred to as either tourists (those who stay overnight or longer in the place visited), or same day tourists. A same day tourist or visitor is one who travels 80 km or more to a destination.

Both tourists and same day tourists are important to Twillingate Islands. However, many tourists “drive through” without stopping, except perhaps to buy a drink or get some gas. For purposes of this study, it is the “real” or “hard” tourist who stays for several hours or a night and spends money rather than the “soft” drive through tourist that will be referred to and at whom this study is aimed. Thus, the number of real tourists to Twillingate in 2002 was more likely in the neighbourhood of 15-20,000 individuals.

\(^2\) In 1995, approximately 15,000 people were estimated to have visited Twillingate (EPG: XI, 1996). In 1997, between 12,500 and 20,000 visitors were estimated to have visited the area. (Sheppard, 1997, 61)). In 1998, approximately 13,000 were estimated to have visited the area annually over the past five or six years (Avalon Consultants, Inc. 1998).
There is no statistical data available on visitation to Twillingate or the immediate area. Based on data collected from local accommodations in Twillingate, we would guestimate that total tourist visitation to the community would be in the range of 20,000 to 30,000, probably at the higher end of the range. However, it is also important to note that a large part of that visitation is of ‘low quality’, meaning people who have little or no propensity to participate in tourism activities. This would include business visitors, visiting friends and relatives and, most particularly, pass-through/pass-by visitors who stop only for gas and pop before they continue on. So a more realistic estimate of visitation of ‘quality’ visitors having a propensity to do something in Twillingate is likely more in the 15,000 to 20,000 range.

4.4 THE MARKET CONTEXT FOR TWILLINGATE

4.4.1 Key Trends Impacting Travel and Tourism

Socio-Demographic Trends

The Aging Baby Boomers – 10 million in Canada and 78 million in the US will impact tourism in a number of ways:

- As they retire, they will have more time for travel – and travel has always been an important part of the lifestyle of the Boomers.
- They are expected to have more money in retirement than previous generations thanks to more generous pension programs, growth in real estate values, etc.
- It is expected that spending in retirement will focus less on the consumption of durable goods and more on specialty goods, services, and experiences such as travel.
- These “mature” travellers will have different interests than the traditional mature/seniors market – they will be more active, have higher expectations for experiences, quality and service; and will be seeking new and different destinations that they have not already visited.
- This is a generally well-educated market segment and this can be expected to influence their travel interests.
- They are expected to be interested in the following types of experiences:
  - Soft adventure – hiking, kayaking, bird watching, etc. – but with comfortable accommodations and good meals at night.
  - Experiencing different cultures and ways of life.
  - Learning while on vacation – interpretive programs, personal enrichment, in-depth learning about natural and cultural heritage.
  - Fine cuisine and wines.
  - Heritage and historical sites.
  - Multi-generational travel, e.g. with grandchildren.

- The proportion of the population in younger age groups is declining, as is the birth rate:
  - Demand for very active, extreme adventure experiences is likely to decline.
  - The tourism industry is expected to find it increasingly difficult to find the staff needed to operate their businesses – and meet the service expectations of the Baby Boomers.

- Much of the population growth in Canada will come from immigration. In the US, the growth in Hispanic and Black populations is outpacing the overall population growth.
o It is unclear whether these growing market segments will have similar travel patterns, volumes and interests as other segments of the Canadian and US markets.

o The growth in the US population is occurring in the western and southern parts of the country – away from Atlantic Canada’s traditional New England markets. This means Atlantic Canadian destinations may have to place more focus on longer haul markets if visitation from the US is to continue to grow.

o The population continues to be under time pressure – from a competitive work environment, from two income families, from caring for children and/or parents and from attempting to balance the expectations of the family and the workplace with a desire for fulfilment. From a travel perspective, this means:
  o Continued interest in shorter vacations
  o Shorter advance planning times
  o Demand for flexibility on vacations
  o Desire for good quality experiences

o For those with families, quality time spent with family members will continue to be an important vacation consideration.

**General Travel and Tourism Trends**

o Travellers are looking for experiences – and this could include outdoor adventure, cultural and heritage interpretive programs, festivals, opportunities to interact with local people, personal enrichment, opportunities for family learning, etc. etc. This means that destinations and attractions have to offer more than just great scenery, friendly people and static displays.

o Recent US research suggests that making a connection is an important feature of travel today – with family, heritage and nature.

o Travellers today are generally well-travelled (much more so than earlier generations), and well-educated. They have also been exposed to a wide range of travel experiences through the media and through extensive and aggressive marketing efforts of numerous destinations around the world. They are seeking something new, something different – a bit unique and exotic, and they have generally high expectations for their travel experience.

o In the past two years, travel patterns have changed:
  o Trips are shorter and more frequent.
  o Value is more important. This doesn’t necessarily mean cheap, but travellers “need to understand the services for which they are paying … and be able to choose the service enhancements they value most”. (CTC Tourism Intelligence Bulletin, 2002) This means tourism suppliers have to offer flexibility to meet the needs of different market segments.
  o Air travel has declined and auto travel (as well as travel by recreational vehicle) has increased – this means destinations closer to home.
  o Advance booking time has decreased.
• Interest in **cruising** continues to grow (up by 4% in the first half of 2002). Continued increases in the number and size of cruise ships are projected for the next few years. This has made the cruise line industry more aggressive with respect to pricing and marketing.

• The role of the **Internet** in researching destinations, in trip planning and in booking travel continues to increase. For the first time, smaller tourism businesses and more remote destinations, like Newfoundland and Labrador, have the opportunity for coverage in the global tourism marketplace with relatively little investment. A number of tourism businesses around Atlantic Canada are using the web very successfully as their main marketing tool, and attracting business from all over the world. However, the Web presence must be top quality, well linked, up-to-date and user friendly.

• The issue of **air access** is going to remain a critical factor in the tourism sector generally, and particularly in Atlantic Canada and in its smaller communities. Although air travel has declined, good air access remains critical to developing a strong tourism destination. Continued uncertainties in both the Canadian and US airline industry, particularly recent announcements from Air Canada, are a constraint to the growth of tourism. Having sufficient airplane capacity at reasonable prices and with good service to/from existing and emerging markets will be an ongoing challenge for this region.

• Competition for the travel and tourism dollar will continue to be strong. Recent declines in travel within the US have prompted significant increases in marketing budgets encouraging “travel at home”. International destinations cruise lines and major resort destinations. All will continue to invest heavily in attracting the North American traveller. And with soft demand, particularly in the short term, pricing can be expected to be very competitive.

• Within the travel trade sector, there are ongoing trends that will impact travel activity. The use of, and number of, travel agents is declining and there is consolidation within the tour operator sector, particularly larger tour operators. At the same time, smaller, niche tour operators appear to be having more success. Tour operators are modifying their tour products to reflect the demands of the consumer – more flexibility, more intensive experiences, more time at one destination, etc.

### 4.4.2 The Travel Activities and Motivation Study (TAMS)

TAMS is a major consumer survey undertaken in 1999/2000 and sponsored by the Canadian Tourism Commission and a number of tourism industry partners from across the country. It explored travel activity, travel motivators and the types of activities and experiences sought during travel by both Canadians and Americans. The resultant extensive database was used to generate over 15 reports on different markets, segmented primarily by their activity interests.

TAMS offers some interesting market segmentation approaches and identifies several segments that have particular interest for Newfoundland and Labrador. These include:

**Touring Market Segments**

• Personal Explorers
• Exotic Tour Seekers
Outdoor Market Segments
- Naturalists
- Hunters and Fishers

A discussion of the key characteristics and interests of three of these market segments that have been identified as having potential for Twillingate Islands is provided later in this section.

One of the TAMS reports explores “emergent vacation interests” based on the types of vacation experiences travellers had sought in the past and intended to seek in the future. The report suggests emergent interest in:

- Intimate and romantic vacation experiences
- Seeking out different cultures and ways of life
- Seeing important natural sites
- Indulging in fine cuisine
- Experiencing unspoiled nature

One of the TAMS reports examines the travel interests of different lifestyle segments – market segments characterized according primarily according to their age. Two of these segments, the mature market segment and the senior market segment, are of particular interest for this assessment.

The Mature Market
- 36 to 65 years old, no children in the household under the age of 20
- Represents almost 1/3 of the total travel market
- Tends to be well-educated and affluent
- Slightly more likely to seek out exploratory vacation activities such as natural sightseeing, visited gardens or natural attractions, visited museums, art galleries or historical sites
- Also more likely than average to have shopped and dined while travelling
- More likely to have toured using their own vehicle, and to have taken a winery tour
- Above average users of travel packages

The Seniors Market
- 66 and older, no children in the household under the age of 20
- Represents about 15% of the travel market – the smallest segment
- Tended to have lower levels of education and income
- More likely than average to travel to Canada and overseas
- Most likely of all segments to seek out exploratory vacation experiences
- More likely to see vacations as a chance to seek out personal enrichment
- Less likely to participate in outdoor activities but more likely than average to participate in natural sightseeing, visits to gardens and natural attractions, museums, art galleries, historical sites and cultural festivals
- More likely than average to take guided tours
- More likely than average to use traditional information sources such as printed material

TAMS also provides insights into the participation of travellers in a variety of outdoor, cultural and touring activities, and intentions to participate in these activities in the future. In the outdoor sector, the “most pronounced emergent interests were often the more usual or exotic
activities such as having an Arctic experience, whitewater rafting, scuba diving, hot air ballooning, snowmobiling and whale watching.” (Lang Research Inc., 2001)

In the culture and entertainment area, visiting natural wonders such as Niagara Falls was the most pronounced emergent vacation interest, along with facilities such as theme parks, carnivals and music festivals, and visits to historical sites or historical replicas with re-enactments. Travellers also reported that they were more likely to take many of the overnight and day tours identified, particularly ocean cruises.

Tables 9 through 11 provide a summary of this information. It has been extracted from the TAMS Overview Report. Specifically it presents information on:

- Percentage of the Total Population (18+) who took a trip in the last two years, and participated in the activity identified, and
- Percentage of the Total Population (18+) who have taken a trip in the last two years, and are planning to take a trip during the next two years, and indicated that they were likely to participate in selected activities.

For some activities, the data is available for the Canadian and US markets separately as well as combined; in other cases it is only available for the combined US/Canada market. In the final column of each table, EPG has calculated the percentage change in likely participation in the activity. For activities with fairly low current participation rates, a small increase in future intentions creates a high percentage change.

It is important to note that this research did not explore the access of those surveyed to these types of activities or factors such as their willingness to spend the money, take the trips, or do whatever else might be necessary to participate in these activities. As such, the data should be viewed with caution and be seen as indicative only of general trends in the activity and not a projection of future activity.
### Table 9 - Participation in, and Future Interest in Outdoor Activities while Travelling

<table>
<thead>
<tr>
<th>Activity</th>
<th>Participated While Traveling in Past Two Years</th>
<th>Future Intentions to Participate While Traveling vs Have Previously Participated</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Canada</td>
<td>US</td>
</tr>
<tr>
<td>Picnics in Park Settings</td>
<td>48%</td>
<td>44%</td>
</tr>
<tr>
<td>Sunbath/Sit on Beach</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Swim in Ocean</td>
<td>33%</td>
<td>42%</td>
</tr>
<tr>
<td>View Other Wildlife</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Swim in Lake</td>
<td>46%</td>
<td>35%</td>
</tr>
<tr>
<td>View Wildflowers</td>
<td>25%</td>
<td>28%</td>
</tr>
<tr>
<td>Freshwater Fishing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hike/Backpack in Wilderness Setting</td>
<td>29%</td>
<td>21%</td>
</tr>
<tr>
<td>Play Occasional Golf</td>
<td>24%</td>
<td>19%</td>
</tr>
<tr>
<td>Motorboating</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recreational Biking</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>Saltwater Fishing</td>
<td>7%</td>
<td>15%</td>
</tr>
<tr>
<td>Bird watching</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Kayak/Canoeing</td>
<td>17%</td>
<td>13%</td>
</tr>
<tr>
<td>Horseback Riding</td>
<td>9%</td>
<td>13%</td>
</tr>
<tr>
<td>Whale Watching</td>
<td>16%</td>
<td>12%</td>
</tr>
<tr>
<td>Mountain Biking</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rock Climbing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bike on Overnight Touring Trip</td>
<td>1.7%</td>
<td>2%</td>
</tr>
</tbody>
</table>

**Winter/Snow-Activities**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Participated While Traveling in Past Two Years</th>
<th>Future Intentions to Participate While Traveling vs Have Previously Participated</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Canada</td>
<td>US</td>
</tr>
<tr>
<td>Downhill Skiing</td>
<td>14%</td>
<td>12.0%</td>
</tr>
<tr>
<td>X-Country Skiing</td>
<td>10%</td>
<td>5%</td>
</tr>
<tr>
<td>Snowmobile on Organized Trail</td>
<td>6%</td>
<td>4.3%</td>
</tr>
<tr>
<td>Snowmobile on Overnight Touring Trip</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>X-Country Ski on Overnight Touring Trip</td>
<td>1.2%</td>
<td>1%</td>
</tr>
<tr>
<td>Dog Sledding</td>
<td></td>
<td></td>
</tr>
<tr>
<td>See Northern Lights/Arctic Experiences</td>
<td>4%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Table 10 - Participation in, and Future Interest in Culture & Entertainment Activities while Traveling

<table>
<thead>
<tr>
<th>Activity</th>
<th>Participated While Traveling in Past Two Years</th>
<th>Future Intentions to Participate While Traveling vs Have Previously Participated</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Canada</td>
<td>US</td>
</tr>
<tr>
<td>Restaurant Dining</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shopping or Browsing (clothing, shoes, jewelry)</td>
<td>63%</td>
<td>60%</td>
</tr>
<tr>
<td>Reading for Relaxation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Movies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shopping or Browsing (local arts and crafts)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zoos</td>
<td>31%</td>
<td>44%</td>
</tr>
<tr>
<td>General History or Heritage Museums</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local Festivals or Fairs</td>
<td>26%</td>
<td>35%</td>
</tr>
<tr>
<td>Aquariums</td>
<td>21%</td>
<td>34%</td>
</tr>
<tr>
<td>Amusement Parks</td>
<td>17%</td>
<td>35%</td>
</tr>
<tr>
<td>Natural Wonders</td>
<td>32%</td>
<td>33%</td>
</tr>
<tr>
<td>Farmer's Markets</td>
<td>24%</td>
<td>32%</td>
</tr>
<tr>
<td>Art Galleries</td>
<td>24%</td>
<td>32%</td>
</tr>
<tr>
<td>Casinos</td>
<td>26%</td>
<td>32%</td>
</tr>
<tr>
<td>Theatre</td>
<td>28%</td>
<td>29%</td>
</tr>
<tr>
<td>Science/Technology Museums</td>
<td>19%</td>
<td>26%</td>
</tr>
<tr>
<td>Historical Sites</td>
<td>17%</td>
<td>26%</td>
</tr>
<tr>
<td>Botanical Gardens</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Historical Replicas of Cities Towns with Re-enactments</td>
<td>13%</td>
<td>19%</td>
</tr>
<tr>
<td>Garden Attractions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Musical Festivals</td>
<td>9.7%</td>
<td>10%</td>
</tr>
<tr>
<td>Aboriginal Attractions</td>
<td>3%</td>
<td>10%</td>
</tr>
<tr>
<td>Theatre Festivals</td>
<td>7.9%</td>
<td>8%</td>
</tr>
<tr>
<td>French Canadian Cultural Experiences</td>
<td>9%</td>
<td>4%</td>
</tr>
<tr>
<td>Powwows or Aboriginal Celebrations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Participate in Hands-On Learning Experiences while on Vacation</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 11 - Participation in, and Future Interest in Taking Overnight and Day Tours and Cruises

<table>
<thead>
<tr>
<th>Activity</th>
<th>Participated While Traveling in Past Two Years</th>
<th>Future Intentions to Participate While Traveling vs Have Previously Participated</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Canada</td>
<td>US</td>
</tr>
<tr>
<td>Walking Around Small Towns &amp; Villages</td>
<td>44%</td>
<td>49%</td>
</tr>
<tr>
<td>Coastal or lakeshore scenic drives</td>
<td>46%</td>
<td>47%</td>
</tr>
<tr>
<td>Guided day bus tours in cities</td>
<td>15%</td>
<td>19%</td>
</tr>
<tr>
<td>Scenic Day or Evening Tours by Boat</td>
<td>16%</td>
<td>17%</td>
</tr>
<tr>
<td>Going to Wineries for Day Visits &amp; Tasting</td>
<td>11%</td>
<td>17%</td>
</tr>
<tr>
<td>Guided Scenic Tours in the countryside</td>
<td>8%</td>
<td>15%</td>
</tr>
<tr>
<td>Ocean Cruises</td>
<td>6%</td>
<td>13%</td>
</tr>
<tr>
<td>Touring a Region's Wineries</td>
<td>7%</td>
<td>12%</td>
</tr>
<tr>
<td>Scenic day tours by train</td>
<td>5%</td>
<td>9%</td>
</tr>
<tr>
<td>Scenic day tours by air</td>
<td>2%</td>
<td>4%</td>
</tr>
</tbody>
</table>


4.5 KEY MARKET SEGMENTS WITH POTENTIAL FOR TWILLINGATE

Market segmentation involves defining audiences according to various unique characteristics, in ways that are likely to receive the best response to marketing efforts. There are various different ways of segmenting markets, including:

- Geographic origin – where the markets live
- Demographics such as age, income, education, family composition
- Psychographics such as interests, tastes, types of experiences they are likely to seek
- Purpose of trip – pleasure, visiting friends and relatives, business, etc.
- Means of travel – by auto, air, ferry
- Channels of distribution – how they purchase the travel product such as through tour operators, travel agents.

Based on our research, as well as the recently completed Newfoundland and Labrador Marketing Strategy Review prepared by The Economic Planning Group, we have identified a number of market segments that may have potential for Twillingate. These are:

- General Touring/Explorer Market
- Eco and Adventure Tourism Market
- Cultural and Heritage Tourism Market, including learning vacations
- Getaway Vacations.
Each of these market segments is explored below with respect to their size, growth trends, interests and activities along with implications for Twillingate Islands. As per the RFP, we have also provided some information on the adventure cruising market segment.

4.5.1 General Touring/Explorer Market

The touring and explorer market segments were identified as priority “psychographic” market segments for Newfoundland and Labrador in the Tourism Marketing Strategy Review prepared for the Department of Tourism, Culture and Recreation in 2002. Within these segments, the following geographic markets were identified, in order of relative priority:

- Ontario
- Maritimes
- Alberta (subject to market testing)
- North East USA and Other USA (both subject to testing).

Research presented in the TAMS study reveals the following characteristics of the subsegments of the touring and outdoor market that have the most potential for the province and generally fit within the touring/explorer segmentation.

**Personal Explorers**

- 23% of Canadian travellers or some 4 million persons
- 24% of American travellers, or some 36.5 million persons
- Average age 44 years; 69% are between 26 and 55 years
- Above average household income and education - 25% have household incomes over $80,000; almost 71% have advanced degrees
- 60% are employed; 13% are self-employed and 12.4% are retired
- Affluent Young Couples, Affluent Mature and Senior Couples
- Take a larger than average number of trips to a wider array of destinations
- Canadians more likely to travel in Canada; Americans more likely to have visited Canada; both Canadians and Americans more likely to expect to vacation in Canada
- Seek out a broad range of vacation experiences; quite active in outdoor activities such as natural sightseeing, canoeing, hiking and kayaking; cultural and entertainment activities include shopping, dining, visiting museums, art exhibits and historic sites
- This segment is seeking to discover new experiences as part of their trip
- Canadian Personal Explorers more likely than all Canadian travellers to have visited Newfoundland and Labrador (5% compared to 3%).

**Exotic Tour Seekers**

- 8.9% of Canadian travellers or some 1.5 million persons
- 9.4% of American travellers or some 14.2 million persons
- Average age 46 years; 62% are 26 – 55 years
- Above average income and education – 21% have household incomes over $80,000; 65% have advanced degrees
- Almost 19% are retired
- More likely than average traveller to have plans to travel in Canada over next two years
- Seek out exploratory vacation experiences - particular interest in natural sightseeing and visiting natural phenomena; also more likely than average to participate in vigorous physical activity such as canoeing, kayaking, hiking, sailing. Noticeable interest in gardens and natural attractions - desire to get back to nature.
Both Canadian and US Exotic Tour Seekers more likely than all travellers to have visited Newfoundland and Labrador (5% compared to 3% for Canada; 7% compared to 3% for US).

Naturalists
- 8.1% of Canadian travellers or some 1.4 million persons
- 7.8% of American travellers or some 11.8 million persons
- Oldest outdoor segment - tend to be in mature and senior segments with an average age of almost 52 and 64% are over 46 years
- Average income - 20.5% have household incomes over $80,000; and education – 14% have advanced degrees
- More likely to seek exploratory activities such as seeing natural wonders, historical sites, and to include natural sightseeing (e.g. bird watching). Also above average participation for culture and entertainment activities with a natural theme, and visiting museums and historical sites.
- Prefer relatively economical vacations
- Both Canadian and US Naturalists were more likely to have visited Newfoundland and Labrador than average.

4.5.2 Eco and Adventure Tourism Segment

An important introduction to any discussion of this market segment is to define what is meant by eco tourism and what is meant by adventure tourism. Although there is some overlap, and ecotourism can be adventure and vice versa, there are some particular characteristics that define the two.

Adventure tourism is defined by the Canadian Tourism Commission as an “outdoor leisure activity that takes place in a remote/wilderness/unsual location and is associated with high levels of physical activity and risk (hard adventure) or low levels of exertion and risk (soft adventure).”

Ecotourism, on the other hand, can be defined by the 4Rs – responsible, respectful, reasonable and rational and differs from adventure tourism in that it is “responsible travel to natural areas which conserves the environment and improves the quality of life of local people.” The word ecotourism is frequently misused to refer to a broad range of outdoor, nature-based experiences. Ecotourism activities tend to be more focused on environmental appreciation and learning rather than just the activity, and ecotourists are committed to environmental conservation and protection. True “ecotourists” are actually a relatively small sub-set of the adventure tourism market.

The actual size of the adventure tourism market is a matter of debate and is impacted by the definition used. A 1996 study, *The Importance of Nature to Canadians*, indicated that 84.6% of Canadians (20 million) took part in one or more nature activities (this could include reading related to nature) in 1996 with 10 million participating in outdoor activities in natural areas. However, a significant amount of this activity was home-based – only 17% of outdoor activity participants participated outside their province of residence. The same study reported that 191 million trips were made to participate in outdoor activities of which ¾ were same day trips and ¼ were overnight trips.

Some characteristics of adventure travellers:
Typically between 30 and 50 years, though recent trends indicate older markets, and families, are also participants in adventure activities.

- Relatively high level of disposable income
- Well-educated
- Tend to travel alone, in couples or small groups
- About one third of participants in outdoor activities can be defined as the enthusiasts or avid based on their frequency of participation. These enthusiasts usually account for 70% - 80% of the activity within their sport/outdoor adventure activity
- There is growing interest in “multi-activity” adventure experiences, for example hiking and kayaking as part of the same trip.

A recent report, (World Tourism Organization, February 2002), The Canadian Ecotourism Market drew the following conclusions about the Canadian market, drawing on several sources of data:

- 18% - 24% of Canadians over 15 are interested in ecotourism-related activities
- Ecotourists have higher than average household incomes – with 19% - 37% reporting incomes over $70,000
- Ecotourists are concentrated in the mid-older age groups, particularly 40 – 65 years
- Ecotourists are highly educated.

The same report concluded that ecotourism activities were undertaken as part of another type of vacation for most travellers rather than as a stand-alone vacation experience.

In the United States, a Travel Industry Association study in 1999 reported that 98 million Americans had taken an adventure trip in the five years preceding the study, with 31 million participating in hard adventure including rafting, scuba, diving or mountain biking. Various other sources have suggested that the adventure travel market has been the fastest growing market segment in the past five to ten years with annual growth rates of 15% - 20% or more, much higher than the travel market overall.

While various research studies indicate continued growth in participation rates in a variety of outdoor activities, there is no hard data on the US nature/adventure/ecotourism travel market to support these assertions of high rates of growth. In fact, a recent World Tourism Organization report, while acknowledging that this is a significant and growing market segment, suggests that these estimates of growth may well have been too high (World Tourism Organization, 2002). The characteristics of the US adventure and ecotourism market segments are similar to those of the Canadian market. In both cases they are somewhat older, better educated and with higher incomes than the average population – not unlike the travel market as a whole.

### 4.5.3 Culture and Heritage Tourism Market

Again, definitions are important in understanding this market segment. The World Tourism Organization defined cultural/heritage tourism in 1982 as “…covering all aspects of travel whereby people learn about each other’s way of life and thought”. Another study (LORD Cultural Resources, 1997) defined cultural/heritage tourism as “Visits by persons from outside the host community motivated wholly or in part by interests in historic, artistic, scientific or lifestyle/heritage offerings of a community, region, group or institution”.
One of the key factors for consideration with respect to cultural and/or heritage tourism is the extent to which it is a primary motivation for a trip or selection of a destination. A 1996 study by the Travel Industry Association of America indicated that 5% of Americans (10 million) reported that an interest in an historic place or museum prompted their trip. In Canada, 11% of all domestic trips and 16% of overnight domestic trips by Canadians in 1999 involved at least one culture/heritage activity (not necessarily motivated by the culture/heritage activity).

Culture and heritage travellers in both Canada and the United States have the following characteristics compared to other travellers:

- Travel further
- Stay longer
- Have a higher spending level per trip – almost twice the average
- Travel more frequently
- Are better educated and with higher incomes
- Less likely to have children at home
- Participate in more activities per trip – US culture and heritage travellers participate in 2.5 activities per trip compared to 1.8 for the average traveller
- Have a stronger interest in international destinations (including Canada for US cultural/heritage travellers)
- Are more likely to use commercial accommodations

Given the socio-demographic trends described earlier, culture and heritage tourism is expected to grow at a faster pace than global tourism.

This market is demanding more in the way of cultural/heritage experiences – more interpretation, more opportunities to learn and for hands-on activities, more demonstrations, more “living history” and more opportunities to meet and interact with local people so as to truly experience the culture of a destination.

A sub set of this market segment is the Learning Travel Market. A report prepared for the Canadian Tourism Commission, *Canadian Ed-ventures: Learning Vacations in Canada: An Overview* provides descriptions of learning travel and learning vacations: (Arsenault, 2001)

“Learning travel is a magical mix of authentic, high-quality, learning opportunities allowing visitors to experience and interact with the cultural, historical and natural wonders of an area, attraction or event” (Page 5)

A learning vacation is defined as a vacation offering a pre-organized, structured, high-quality learning opportunity that allows visitors to experience the authentic cultural, historical and natural wonders of an area. Learning vacations are led by expert guides or resource people. Participants travel to, and stay at, one or more locations away from their usual place of residence” (Page 7)

The TAMS research indicates that 7.2% (12 million) of the travellers in North America sought out a participatory hands-on learning experience while on vacation during the past two years, and that an additional 8% expected to seek this type of experience in the next two years.

Learning travel can involve short, part day to one-day experiences that are part of a trip taken for another reason or multi-day experiences. The types of learning experiences offered are broad and can include:
o Natural heritage
o Cultural heritage including Aboriginal cultures
o Cultural activities such as art, crafts, music
o History
o Special interest topics such as gourmet cooking, bird watching, wine tasting, geology, rock hounding, etc. etc.
o Outdoor activities

Learning travel markets have traditionally been older and senior adults – the Elderhostel program started offering these types of programs in the early 80s, catering primarily to seniors. While it is anticipated that older adults will continue to be a primary market for learning travel experiences, the aging baby boom market is seen to offer significant growth potential for this product – they are well educated, have an interest in learning and are seeking opportunities for enrichment and fulfilment through travel. As well, the TAMS research suggests that families with older children also have a strong interest in participating in learning experiences while travelling.

‘Learning’ travellers tend to have the following characteristics:
- Well-educated
- Financially secure
- Well-travelled
- Well-informed
- Concerned about authentic, quality experiences

The TAMS research also indicates that the travellers who participated in hands-on learning while on vacation had a higher than average participation rate in various exploratory vacation activities (e.g., visiting natural sites, museums, art galleries) and were also quite active in a broad range of outdoor activities, especially energetic activities such as team sports, canoeing, kayaking and backpacking, extreme sports (e.g., hang-gliding), biking, rock and ice climbing, sailing, windsurfing and scuba diving. (Lang Research Inc., 2001)

4.5.4 Getaway Vacations

This is a sub-segment of the leisure travel market, and given the characteristics described below, it is almost exclusively a Newfoundland resident market. Recent trends suggest that travellers are taking more frequent, shorter trips than in the past, and that the pressures of balancing family and work lives continues to drive demand for shorter, getaway vacations. These types of getaway vacations tend to be built around weekends, last three to five days and be auto-based. Significant special events and festivals can act as demand generators for these types of trips – the Ottawa Winterlude Festival, Quebec Winter Carnival and Montreal Jazz Festival are all examples of products that have been developed to help attract visitors to their destinations.

Easy access to the destination is a critical factor in attracting this market segment. Since the trips are short, there is little interest in spending most of the available time travelling to and from the getaway vacation destination. Good accommodations and dining are also important as are a range of activities including shopping.

3 Elderhostel Canada no longer exists. A new company, Routes to Learning Canada now offers Canadian programs to Elderhostel Inc. along with a wide range of other learning travel programs.
Destinations that can be reached easily and affordably obviously do better in the getaway market. For Twillingate Islands, that is problematic, at least for off-island markets for whom a trip to the area is a major undertaking. Newfoundland residents within a reasonable driving distance, on the other hand, represent a potential getaway market for the community.

A significant portion of the Newfoundland resident market is on the Avalon Peninsula and the five plus hour drive to Twillingate makes the region too far for most getaway vacations.

We have concluded, therefore, that the potential for Twillingate Islands in the getaway market is from the central Newfoundland area rather than from the Avalon Peninsula.

On the other hand, Twillingate Islands are well situated to be a stop or destination for provincial residents travelling in-province on their vacation. As discussed earlier, there are some 1.3 million overnight trips made by provincial residents in the province, and a significant portion of them are vacation trips. Twillingate Islands have the potential to attract from this market segment for a portion of their vacation trip.

4.5.5 Adventure Cruising

A segment of the cruise industry is the exploration/expedition/adventure cruise sector, which represents a little over 30,000 passengers, or about 0.3% of the more than 10 million passengers per year that go on cruises worldwide. An estimated 2500 passengers sailed on Adventure cruises in the East Coast of Canada region in 2002, some 37% of them on adventure cruises involving stops in Newfoundland and Labrador.

The community in 2002 was slated to receive visits from two of the adventure cruise vessels, Le Levant and Polar Star, both of which having been active with Newfoundland cruise programs in recent years. More such visits are likely with the expected growth in adventure cruise operations in the province. A new tall ship adventure cruise operation is coming into the market in 2003, with cruises of the west coast of the island and Labrador.

This segment clearly has growth potential for the province as a whole and some limited potential for Twillingate Islands as well. However, the location of Twillingate Islands means that it is really only positioned for the Newfoundland circumnavigation sub-segment of the cruise market, and this is a market segment that is in its infancy.

4.6 SYNOPSIS OF MARKET OPPORTUNITIES AND IMPLICATIONS FOR TWILLINGATE

The information presented above has provided a range of insights into market expectations, interests and trends. In developing and enhancing tourism products and experiences on Twillingate Islands, it will be important to respond to these market insights (i.e. match market needs and interests with the products).

Based on the research provided, it is evident that, from a socio-demographic perspective, it is the affluent mature and senior market segment that generally offers the best potential for Newfoundland and Labrador, and for the Twillingate area. This market has the following key characteristics:

- It represents 3.5% of the Canadian market and 4.7% of the US market
85% of this segment are between the ages of 35 and 65 years
100% are university educated and have household incomes over $80,000
They travel much more frequently than other market segments – an average of some 14 overnight trips per year compared to the Canadian average of 7.1 overnight trips per year
They are much more likely than most other market segments to travel to other states/provinces
They are generally more likely than other market segments to seek out the following types of experiences while travelling:

- Exploratory experiences including to see and experience natural wonders, historical sites, different and distinctive cultures and unspoiled nature – things that are different from one’s day to day experiences
- Nature sightseeing – viewing wildflowers, bird watching, other wildlife viewing
- Golf
- Shopping and dining
- Museums, art galleries and historical sites
- High arts such as theatre, classical music concerts
- Garden related attractions, botanical gardens and natural wonders
- Seaside resorts
- B&Bs
- Touring by personal vehicle
- Wine tours
- Ocean cruises.

While some of these activities and interests are not products that Twillingate can provide, there are many that are an ideal fit with the natural, heritage and cultural resources offered in the Twillingate area.

Twillingate Islands and the entire central region of Newfoundland face tough competition from the Avalon Peninsula as well as Western Newfoundland, both of which have more tourism product and infrastructure in place, and better access for tourism markets, both for touring trips as well as getaways for non-resident tourists. So, for trips by non-resident tourists of a week or less in the province, these other regions have strong advantages.

For visitors on longer touring trips in the province, Central Newfoundland and Twillingate Islands are in a better position, particularly for trips involving cross-island travel. The kinds of tourism initiatives that can help build visitation from this market segment include:

- Suggestions for unique local self-guided itineraries and packages of a day or less in duration that can be readily added to touring trips
- More outdoor adventure outfitters and operators
- More shopping and dining opportunities, particularly involving local crafts and menu items
- Conservation of heritage buildings, businesses and way of life
- More opportunities to meet local residents and share in their entertainments and local events
- More opportunities to learn more about the history and culture of the community
- More emphasis in marketing of the dinner theatre program in the community.
The ‘personal explorers’ and ‘exotic tour seekers’ segments of the leisure tourism and touring marketplace are of particular interest to Newfoundland and to Twillingate Islands, as these are people prepared to travel more, farther and spend more if the experience at the other end is worth it and of a unique character.

For the Newfoundland resident market, there are two opportunities: the getaway market and as a stop on a vacation trip. As mentioned earlier, Newfoundland residents living within a reasonable driving distance (i.e. from Central Newfoundland) represent a potential getaway market for the community. However, limited potential is seen for more distant resident markets such as from the Avalon, and for off-island tourist getaway trips to the area. The kinds of planning that can help develop this market include:

- More unique events
- Getaway packages involving experiences unique to the area and the community
- Value-added and off-season savings offers.

Twillingate Islands are also well situated to attract a portion of the Newfoundland resident vacation market – as a stopping point on vacation trips across the province or as part of longer stays in the Twillingate area.

Special interest and leisure-learning markets are less affected by logistical factors and represent a latent market sector for Twillingate Islands. However, excellent offerings are a prerequisite. Suggestions for the community include:

- Structured learning/enrichment packages based on culture, nature and heritage
- Guided interpretation tours based on local community history, natural features.

The rapid growth in role of the Internet as a trip planning aid for travellers presents a major new opportunity for places such as Twillingate Islands, in allowing them to reach external markets likely to have an interest in the community’s unique appeals and products.

4.7 INSIGHTS FROM THE TRAVEL TRADE

In-Bound Tour Operators

For this study, three Newfoundland tour operators and six tour operators from outside of Newfoundland, who bring a total of more than 3500 tourists to Newfoundland and Twillingate Islands annually, were interviewed. Without exception all tour operators found Twillingate to be a very good tourism destination, primarily as a day or side trip. They found the product to be of sufficient quality for their clientele with enough attractions for a good day or half day trip and well located within the seven or 14-day tour package of the province. Specific strengths of the Twillingate Islands product include the number of Newfoundland icons found in one place, the town of Twillingate’s ongoing existence as an viable outport community, its natural harbour, the quality of the attractions, and the friendliness of the people. The two tables below summarize the comments of individual tour operators and provide good guidance when developing the overall Twillingate Tourism Master Plan.
### Table 12 - Newfoundland Tour Operators Comments about the Twillingate Islands Tourism Product

<table>
<thead>
<tr>
<th>QUESTION</th>
<th>ANSWERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. of years taking tours to Twillingate Islands?</td>
<td>6-21</td>
</tr>
<tr>
<td>Consumer price point?</td>
<td>Medium to High</td>
</tr>
<tr>
<td>No. of people taken to Twillingate Islands annually?</td>
<td>Total of approximately 2500 individuals</td>
</tr>
<tr>
<td>Increase over previous year</td>
<td>25%</td>
</tr>
<tr>
<td>How long is the stay?</td>
<td>6-7 hours or 1-2 days if self-drive</td>
</tr>
<tr>
<td>What do your passengers do when there?</td>
<td>Prime Berth, Lighthouse, Museum, crafts shops, walk around</td>
</tr>
<tr>
<td>Why are the Twillingate Islands included in your itinerary (i.e. strengths of product)?</td>
<td>Whole package is in one place (e.g. icebergs, scenery, working fish plant, local people with whom you can interact); few other places have such a range of icons/activities that tourist to NF looking for</td>
</tr>
<tr>
<td></td>
<td>Icons exist that tourists are looking for (e.g. icebergs, whales, fishing village, music/food and culture)</td>
</tr>
<tr>
<td></td>
<td>Get genuine outport feeling as well as necessary services (e.g. gas, drug store, crafts shops, restaurant, etc.)</td>
</tr>
<tr>
<td></td>
<td>Good village sense as a result of harbour and coves (i.e. not ribbon development as is often seen elsewhere)</td>
</tr>
<tr>
<td></td>
<td>More genuine NF feeling than places such as Trinity which have become “too touristy and busy”</td>
</tr>
<tr>
<td></td>
<td>Strategically placed as good half way point between west and east coast (e.g. “ideal stopover”) on 7 or 14 day cross island tour</td>
</tr>
<tr>
<td></td>
<td>Good individual products (Prime Berth, Lighthouse, Twillingate Museum, etc.)</td>
</tr>
<tr>
<td></td>
<td>Ability to relax at hotel, if don’t want to go anywhere</td>
</tr>
<tr>
<td>What activities/services would you/your tourists like to see in Twillingate Islands that are not there now (i.e. weakness in product)?</td>
<td>Half day small individual interactive activities</td>
</tr>
<tr>
<td><strong>Activities/services as suggested by tourists to operators</strong></td>
<td>Rent a bike</td>
</tr>
<tr>
<td></td>
<td>More interactive interpretation</td>
</tr>
<tr>
<td></td>
<td>High quality restaurant with atmosphere and fresh food that can seat 40 people</td>
</tr>
<tr>
<td></td>
<td>Small high quality coffee shop/bakery</td>
</tr>
<tr>
<td></td>
<td>More family activities</td>
</tr>
<tr>
<td></td>
<td>Private baths</td>
</tr>
<tr>
<td></td>
<td>More rainy day activities</td>
</tr>
<tr>
<td>QUESTION</td>
<td>ANSWERS</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>Training, training</td>
<td>Consistent high quality of service to meet medium and high end tourists’ expectations</td>
</tr>
<tr>
<td>Commitment to tourism (not just a retirement project)</td>
<td>Greater reflection of region (e.g. Battle Harbour), not Sears or Wal-Mart</td>
</tr>
<tr>
<td>Ability to make reservations in off season</td>
<td>Understanding of how tourists and tour operators work (e.g. tourists go where tour operators tell them; once a town is off a tour operators list, hard to get back on; if want to grow tourism, need to understand tour operators requirements)</td>
</tr>
<tr>
<td>Understanding that Twillingate is good day loop on cross island tour and this will not change; therefore, need to maximize tourist spending, not length of stay</td>
<td>Small specialized tours might stay in one place in Twillingate if accommodation product is upgraded, consistently good and reflects the region (e.g. Fisher’s Loft)</td>
</tr>
<tr>
<td>Greater understanding that area is unlikely to become a destination unless a greater cluster of high quality activities exists in region. However, it will continue to be part of an overall tour if the product is consistently good</td>
<td>Opportunities</td>
</tr>
<tr>
<td>Build “Team Twillingate”; work together; get rid of jealousies</td>
<td>Build on provincial icons because tourists for the most part will not have heard of Twillingate prior to coming (e.g. they will see provincial advertising of icebergs, whales, fishing communities, people and culture and will ask tour operators where they can see these icons)</td>
</tr>
<tr>
<td>Build on harbour advantage</td>
<td>Scavenger type of interactive product which can be done by families and on rainy as well as sunny days</td>
</tr>
<tr>
<td>Increased accommodation rates (product is undersold)</td>
<td>Two night program for individuals will be encouraged if enough product is there</td>
</tr>
<tr>
<td>Original craft product of area to replace loss of Women’s Institute at Lewisporte (e.g. tourists don’t want to see same craft items as all over the island)</td>
<td>“Twillingate works as is; build on that”</td>
</tr>
<tr>
<td>“Concentrate on self-drive tourist and small tours; don’t try to be all things to all people”</td>
<td>“Tourist have opportunity to visit Ryan Premises, Barbour Property, Battle Harbour;”</td>
</tr>
</tbody>
</table>
province and tourists need one genuine working outport community of critical size with high quality services and activities. That’s Twillingate.”

Barriers

Local tourism jealousies that become public (e.g. tourists don’t want to know about internal squabbles)

Not enough product in central Newfoundland to merit its own large tour or longer stay, given the distances in NF and clusters of products elsewhere

Trends

Movement away from static interpretative sites

Tourism requests to operators for 2003 up over last year

More authentic experiences wanted by tourist

Quality fresh food, simple décor reflecting the region and private bath are a necessity for the type of tourist coming to NF

Source: AMEC.

Table 13 – In bound Tour Operators Comments about the Twillingate Islands Tourism Product

<table>
<thead>
<tr>
<th>QUESTION</th>
<th>ANSWERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumer price point?</td>
<td>Medium to High</td>
</tr>
<tr>
<td>No. of people taken to Twillingate Islands annually?</td>
<td>Total of more than 1000 (approximately 36 coach visits and 250 FIT travellers) annually</td>
</tr>
<tr>
<td>Overall rating of Twillingate Islands package</td>
<td>“Better”</td>
</tr>
<tr>
<td>Why are the Twillingate Islands included in your itinerary (i.e. strengths of product)?</td>
<td>One of the outstanding sites in Newfoundland</td>
</tr>
<tr>
<td></td>
<td>Great deal of satisfaction with the product</td>
</tr>
<tr>
<td></td>
<td>The people</td>
</tr>
<tr>
<td></td>
<td>Lighthouse is wonderful</td>
</tr>
<tr>
<td></td>
<td>Inn is good for small motor coaches</td>
</tr>
<tr>
<td></td>
<td>Don’t change a thing</td>
</tr>
<tr>
<td></td>
<td>The Twillingate Islands are a ‘nice’ day trip included in the present itinerary.</td>
</tr>
<tr>
<td>What activities/services would you/your tourists like to see in Twillingate that are not there now (i.e. weakness in product)?</td>
<td>Activities/services as suggested by operators</td>
</tr>
<tr>
<td>Quality of accommodations</td>
<td>Acceptable, but could be improved</td>
</tr>
<tr>
<td>Accommodations capacity</td>
<td>At capacity during peak, therefore, need for more</td>
</tr>
<tr>
<td>Attractions</td>
<td>Rated very good by all operators</td>
</tr>
<tr>
<td>Restaurants</td>
<td>Need improvement</td>
</tr>
<tr>
<td>Visitor services</td>
<td>Adequate,</td>
</tr>
<tr>
<td>Communications with suppliers</td>
<td>Good to very good</td>
</tr>
<tr>
<td>Other</td>
<td>More and improved accommodations, would consider adding an overnight given right mix of</td>
</tr>
<tr>
<td>QUESTION</td>
<td>ANSWERS</td>
</tr>
<tr>
<td>----------</td>
<td>---------</td>
</tr>
<tr>
<td>quality and rate structure. Clientele are seniors (average age 70-72). Therefore, cost and quality needs to be considered</td>
<td></td>
</tr>
<tr>
<td><strong>Opportunities</strong></td>
<td>Increased accommodations for small coach tours down the road</td>
</tr>
<tr>
<td><strong>Barriers</strong></td>
<td>Ferry service to and from Argentia. Because of its instability and schedule, hard to plan coach tours. It’s important for ‘loop’ tours to and from St. John’s. This has resulted in increased tours to west coast of province because of better and more reliable schedule out of Port aux Basques.</td>
</tr>
<tr>
<td><strong>Trends</strong></td>
<td>One tour operator now offers Twillingate Islands as a day destination from St. John’s. Working on adding a new route in 2004, which would include it as an overnight.</td>
</tr>
<tr>
<td></td>
<td>Another tour operator said it would not change existing itinerary because it works well. Does not plan any overnight stays in the future.</td>
</tr>
<tr>
<td></td>
<td>Third operator said clients look for culturally interesting places and authenticity, which Twillingate offers, but timing of itineraries precludes them from overnight stays.</td>
</tr>
<tr>
<td></td>
<td>Fourth operators said same thing. Existing itinerary works too well to change. Maybe down the road overnight stay could be developed for a small niche group.</td>
</tr>
</tbody>
</table>

Source: EPG.
5.0 PREVIOUS STUDIES, PLANNING PROCESSES AND IMPLEMENTATION

5.1 PREVIOUS STUDIES

Listed below are previous studies that have been conducted that pertain to Twillingate Islands.

Table 14 - List of Tourism Studies Pertaining to Twillingate Islands

<table>
<thead>
<tr>
<th>Existing Studies</th>
<th>Year</th>
<th>Prepared by</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northeast Coast Regional Tourism Strategy</td>
<td>1991</td>
<td>The Randolph Group, Management Consultants Inc.</td>
</tr>
<tr>
<td>Feasibility Report Twillingate Historic Fishing Village</td>
<td>1997</td>
<td>Beaton Sheppard Associates Limited</td>
</tr>
<tr>
<td>Heritage Inventory of the Twillingate Islands</td>
<td>1998</td>
<td>Heritage Foundation of Newfoundland and Labrador</td>
</tr>
<tr>
<td>How to Improve Tourism</td>
<td>1999</td>
<td>Twillingate Islands Tourism Association</td>
</tr>
<tr>
<td>Twillingate, What it has to offer</td>
<td>2000</td>
<td>Twillingate Islands Tourism Association</td>
</tr>
<tr>
<td>Way Back When… Remembering Twillingate and New World Island</td>
<td>2000</td>
<td>Life Incorporated</td>
</tr>
<tr>
<td>Hiking Trails of Twillingate and New World Island</td>
<td>2000</td>
<td>The Youth Services Canada Project</td>
</tr>
<tr>
<td>Travel/Tourism Indicators for Newfoundland and Labrador</td>
<td>2000-2001</td>
<td>Newfoundland Statistics Agency</td>
</tr>
<tr>
<td>Travel/Tourism Indicators for Newfoundland and Labrador</td>
<td>2001-2002</td>
<td>Newfoundland Statistics Agency</td>
</tr>
<tr>
<td>Newfoundland and Labrador Tourism Marketing Strategy Review</td>
<td>2002</td>
<td>Economic Planning Group of Canada</td>
</tr>
</tbody>
</table>

5.1.1 Status of Implementation of the Studies

The tables below give the status of the major recommendations found in various studies that directly pertain to Twillingate.

Table 15 lists the recommendations of the 1998 Twillingate Heritage Asset Study and the status of those recommendations.

Table 15 – Status of 1998 Recommended Tourism Development Options – Twillingate Heritage Assets Study

<table>
<thead>
<tr>
<th>Activity</th>
<th>Status</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourist information/guided tours</td>
<td>Not undertaken</td>
<td>Increased iceberg/whaling Tours</td>
</tr>
<tr>
<td>Real Estate development and business marketing</td>
<td>Not undertaken</td>
<td>Aimed at St. John’s; no one to coordinate activity. However, unplanned increased retirement occurring in area.</td>
</tr>
<tr>
<td>Craft Industry development</td>
<td>Not undertaken</td>
<td>Increased no. of craft outlets. Overall shortage of high standard crafts people in province to meet market demand; money limited for craft training program in field</td>
</tr>
<tr>
<td>Food and yacht services</td>
<td>Commercial marine upgrade work undertaken in 2000 and 2001; nothing for private yacht</td>
<td>Need to determine viability</td>
</tr>
</tbody>
</table>
### Table 16 – Status of Theme Concept Plans

<table>
<thead>
<tr>
<th>Item/Activity</th>
<th>Status</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Seals and Icebergs – Long Point Lighthouse</strong></td>
<td>Minimal to lighthouse; only to outside area</td>
<td>Viewing platform and parking completed; oceanic interpretation, craft shop and tea house leased in 2000</td>
</tr>
<tr>
<td><strong>Beothuk-Maritime sites</strong></td>
<td>No</td>
<td></td>
</tr>
<tr>
<td><strong>Architectural interest</strong></td>
<td>No</td>
<td>No heritage by-law. Local heritage buildings continuing to decay</td>
</tr>
<tr>
<td><strong>General scenic interest</strong></td>
<td>Some interpretation</td>
<td>Increase in hikes</td>
</tr>
<tr>
<td><strong>Boat tours</strong></td>
<td>4 operating,</td>
<td>Increase of 3 since 1991</td>
</tr>
<tr>
<td><strong>Interpretation</strong></td>
<td>Some panels (Long Point, harbour)</td>
<td></td>
</tr>
<tr>
<td><strong>Dr. John Olds</strong></td>
<td>Twillingate Museum</td>
<td></td>
</tr>
<tr>
<td><strong>Georgina</strong></td>
<td>Twillingate</td>
<td></td>
</tr>
</tbody>
</table>

Source: left column, *Twillingate Heritage Study, 1998*; all other columns, AMEC.

Tables 16, 17 and 18 list the recommendations of the 1991 *Northeast Coast Regional Tourism Strategy* and the status of those recommendations that pertain to Twillingate Islands.
<table>
<thead>
<tr>
<th>Item/Activity</th>
<th>Status</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stirling</td>
<td>John Peyton</td>
<td>None</td>
</tr>
<tr>
<td>Beach use and recreation</td>
<td>Labrador</td>
<td>None, Some interpretation</td>
</tr>
<tr>
<td>Labrador fishery interpretation</td>
<td>Twillingate</td>
<td>Limited</td>
</tr>
<tr>
<td>Church Museum</td>
<td>Mainstreet</td>
<td>None</td>
</tr>
<tr>
<td>water development</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: left column, Randolph Report, 1991; all other columns, AMEC.

Table 17 - Status of Development Issues

<table>
<thead>
<tr>
<th>Item/Activity</th>
<th>Status</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upgrading</td>
<td>No</td>
<td>No heritage by-laws</td>
</tr>
<tr>
<td>existing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>rather</td>
<td></td>
<td></td>
</tr>
<tr>
<td>building new</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Avoid</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>duplication</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coordinated</td>
<td>No</td>
<td>B and Bs working well together</td>
</tr>
<tr>
<td>and</td>
<td></td>
<td></td>
</tr>
<tr>
<td>upgraded</td>
<td></td>
<td></td>
</tr>
<tr>
<td>marketing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Area image</td>
<td>Rd. to</td>
<td>No local themes or icons established</td>
</tr>
<tr>
<td></td>
<td>Isles</td>
<td></td>
</tr>
<tr>
<td></td>
<td>theme</td>
<td></td>
</tr>
<tr>
<td></td>
<td>implemented</td>
<td></td>
</tr>
<tr>
<td>Seasonality</td>
<td></td>
<td>On-going challenge</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lack of</td>
<td>Improved</td>
<td></td>
</tr>
<tr>
<td>coordination</td>
<td></td>
<td></td>
</tr>
<tr>
<td>among gov’t</td>
<td></td>
<td></td>
</tr>
<tr>
<td>agencies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lack of design</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

Source: Ibid.

Table 18 – Status of Community-Oriented Issues

<table>
<thead>
<tr>
<th>Issue</th>
<th>Status</th>
<th>Date Implemented</th>
<th>By Whom</th>
<th>Reason for implementation/non-implementation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local crafts and products</td>
<td>Minimal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tea room and community supper</td>
<td>Implemented</td>
<td>2000</td>
<td>All Around the Circle Dinner Theatre; Long Point Lighthouse Interpretation Centre</td>
<td>Employment</td>
</tr>
<tr>
<td>Festivals and Events – more than 1-2 days</td>
<td>Implemented</td>
<td></td>
<td>Fish, Fun and Folk Festival</td>
<td>Demand</td>
</tr>
<tr>
<td>The</td>
<td>Partially</td>
<td>2002</td>
<td>Town Council</td>
<td>Tidy towns winner</td>
</tr>
</tbody>
</table>
5.1.2 Lessons Learned and Information To Carry Forward

Many of the recommendations listed in previous reports are based on sound economic reasoning and market demand. Most of them are still valid today. Several of them have been implemented such as the community supper that is combined with all Around the Circle Dinner Theatre and extending the Festival to more than two days. However, many of the themed concept plans have yet to be implemented. This Tourism Master Plan will build on many of the concepts and activities previously recommended.

In 1997 cooperative and comprehensive tourism marketing initiatives did not exist. Additionally, the majority of marketing initiatives were conducted on a single business basis. Brochures were provided to regional tourism information centres, but several residents of Twillingate Islands were concerned that tourists were not fully informed about the range of opportunities in the Twillingate area. Several residents pointed out that bus tours often showed up with neither the driver nor tour leader familiar with the area’s opportunities. The community saw a real need and potential for developing tour packages and more cooperative marketing efforts. The report noted that good quality and accurate information was lacking and that brochures on site or even at tourist centres were too late to attract tourists who had already made their travel plans.

6.0 LESSONS LEARNED FROM COMPARABLE COMMUNITIES

The consultants for this Master Plan completed eight probing interviews with people involved in other communities in Atlantic Canada that have experienced success of various kinds in strengthening their tourism sector. The communities involved included:

- Trinity, NL (3 interviews)
- Bonavista, NL
- Bouctouche, NB
- Shelburne, NS (2 interviews)
- Liverpool, NS

This section presents a synopsis of important insights and lessons learned about these communities.

6.1 LESSONS LEARNED FROM THE INTERVIEWS

- Critical mass of product - The first lesson learned is that there needs to be enough tourism-related product to support tourism – compelling attractions, quality accommodations, a selection of restaurants and shops. There needs to be lots to do.
- Clusters of product - It is valuable to have clusters of tourism amenities rather than force people to have to drive from one attraction or amenity to another. Driving from one cluster to another is not as bad.
A partnership among those involved in tourism in the community – Those in the tourism industry in the community need to work together on matters of common interest, particularly marketing.

Build a destination, not just accommodations - There has to be an effort as well with attractions, activities for visitors, events, training and so on.

A destination marketing program – The industry partners have to concentrate on first selling the destination as a whole, then their respective offerings.

The hub approach – The community is the hub and the spokes are the things to do and see in the area. This should be the approach to packaging and marketing partnerships.

A good website – This is now a basic, and critical requirement.

Reasonable support infrastructure – Good roads, signage, visitor information services and publications, community tourism website

Markets within relatively easy driving distance.

Quality accommodations - This is obviously critical to holding people in the area. Too many operators build properties that are considerably below the standard the province’s travellers prefer.

Enthusiastic volunteers – These are critical, and they need to be supported.

Build capacity and quality first – Make sure you work at strengthening your products and services where necessary before you take them to market.

Quality everything else as well – Facilities, programs and services for tourists need to meet contemporary expectations of the affluent, urban North American traveller.

Good standards of hospitality and customer service.

Genuine, authentic cultural and natural heritage products – It is better to have genuine, authentic nature, cultural programs and heritage attractions than replicas. Today’s travellers want ‘the real thing’. Don’t gentrify things, or homogenize them. Take care to not make your community too ‘touristy’ (tacky).

Design for the tastes of the market, not your own – This is a particular challenge for Newfoundland, as the tastes and expectations of visitors are considerably different from island residents in a number of respects.

Entrepreneurship needs to be encouraged – People that attempt new initiatives need to be encouraged and congratulated, not undermined.

Listen to your customers – Do your research.

There is a growing tourism market among Newfoundlanders – Provincial residents are increasingly doing what visitors are doing.
Government support is critical - With the short tourist season, the industry needs the help of government funding to get them through the early product and market development period.

Funding has to be adequate to get the job done, and done well – In Newfoundland, too much volunteer effort needs to be expended on putting together the funding required for projects and usually the amounts are insufficient to do the job well.

Growth products – Newfoundland tourists are increasingly seeking soft adventure, scenery and interactive/educational experiences.

It takes time and effort – The market development period takes years, and consistent effort. Don’t try to grow too fast, and don’t expect to grow fast.

Bring people along – A special effort has to be made on a continuing basis to help people in the industry and the community to understand what it takes to grow tourism, and why it is worth the effort. They need help in seeing the real tourism opportunities and their potential.

Don’t chase every market – Concentrate on those in which you can truly compete, and that can get to your destination easily.

Event-based programming generates repeat visits – This is a special benefit from events and programming. They can be changed and rotated to make it appealing for people to return.

7.0 STRENGTHS/WEAKNESSES/OPPORTUNITIES/THREATS (SWOT) ANALYSIS

7.1 INTRODUCTION

This section presents the existing strengths, weaknesses, opportunities and threats (SWOT) to developing tourism on Twillingate Islands. SWOT was first developed for strategic planning and marketing purposes in an effort to enhance the performance of targeted businesses. This tool is also amenable to application in tourism research, management and planning and has been recommended by the World Tourism Organization to assist municipalities and local planners in sustainable tourism destination planning.

According to a recent paper (Faulkner, 1998), SWOT analysis:

Includes an assessment of existing and anticipated opportunities and threats within the environment (of a destination or tourism product). Its main purpose is to determine whether or not, in light of emerging environmental conditions, the weaknesses of an enterprise, product or destination have the potential to undermine its long-term survival. If this is so, then those weaknesses will need to be remedied. Alternatively, the enterprise may have certain strengths, which put it into an advantageous position for exploiting new opportunities.
A tourism destination’s strengths will help to identify, stimulate or create new opportunities for tourism development and management whereas a destination’s weaknesses, if not addressed, will expose the area to external threats.

The opportunities identified in this SWOT analysis form the basis of the Twillingate Islands Tourism Master Plan.

7.2 STRENGTHS

Twillingate Islands has many strengths as a tourism product. The following are the most important ones as identified by tourists, tour operators, and tourism specialists.

7.2.1 General Comments

- As discussed in the introduction (1.0), the town of Twillingate’s strength lies in it still being a genuine Newfoundland outport with a working fish plant, natural harbour, historic buildings, friendly people and rugged beauty, yet of sufficient size to offer all the necessary amenities for tourists such as accommodations, food and activities as well as services such as gas stations, pharmacy, Laundromat, grocery and building supply stores, etc.

- Due to prevailing winds and the location of Twillingate Islands on Newfoundland’s northeast coast, opportunities to see icebergs up close are more prevalent on Twillingate Islands on a consistent basis than in most other parts of Newfoundland and Labrador. For tourists, regardless of whether they live inland or by the sea, this is a real attraction and, therefore, an important selling point of the area. The opportunity to also see whales is a value added experience for most tourists.

- The town of Twillingate’s harbour as well as the many coves and bays on the two islands are still ringed with historic houses, wharves fishing stages and sheds that are important tourism features to tourists discovering the area. Many outport communities in the province have fallen prey to ribbon development due to lack of natural features as well as planning and zoning.

- The town of Twillingate still has a working fish plant as well as a large marine centre making it very much a living outport that tourists want to experience.

- Twillingate Islands offer consistently more of the provincial icons (i.e. icebergs, whales, living fishing village, music/food, lighthouses, etc.) in one place than most other Newfoundland or Labrador communities.

- Twillingate Islands are strategically placed half way between St. John’s and the west coast and are, therefore, a convenient, worthwhile and scenic stop over point in an area somewhat underdeveloped in tourist attractions.

- The attractions and activities offered on Twillingate Islands match the interests of the primary market segments visiting the province (e.g. general touring/explorer market, eco and adventure tourism market, culture and heritage market and on island getaway vacations).
Tourism Master Plan for Twillingate Islands
Twillingate Islands Tourism Association Inc., TF34201
April 15, 2003

- Provincial and national tour operators agree the Twillingate Islands are a very strong tourism destination with good growth potential providing the islands enhance what they have and don’t make drastic changes to the existing product.

7.2.2 Human Resources

- Twillingate Islands has a small, but strong, energetic, and dedicated tourism organization.

- As a result of efforts of one B and B owner, all B and Bs are working cooperatively together in an informal manner to ensure that, whenever possible, tourists find a place to stay on Twillingate Islands.

- A few tourist operators have had tourism experience and training elsewhere and have the potential to provide leadership and training to other local operators.

7.2.3 Transportation

- Twillingate Islands can be reached from either the east through Gander or west through Notre Dame Junction making it possible for tourists to drive a loop rather than backtracking, as is the case with many of the scenic side roads off the Trans-Canada Highway.

7.2.4 Natural Tourism Attractions and Activities

- The region’s rugged beauty has attracted tourists for many years. While other regions may have similar beauty, the combination of rocks and cliffs as well as numerous small islands, harbours, coves and bays sets Twillingate Islands apart.

- The drive through New World Islands and Twillingate Islands to the town of Twillingate is very scenic due to the many bodies of water that are crossed and the numerous small islands that dot the bays and coves.

- Opportunities for soft adventure (e.g. walking, hiking, kayaking, boat touring) experiences are numerous, varied and very scenic and have the potential to be of high quality.

- Boat tours to see icebergs, whales, coves and bays and islands are integral to providing a full suite of activities for the explorer and ecotourist market.

7.2.5 Cultural Tourism Attractions and Activities

- Despite its relatively small size, the town of Twillingate has a good mix of attractions (e.g. dinner theatre, museums, living interpretation of the fishery, historic buildings) and a good base upon which to build. On a competitive basis with other provincial and national small-scale attractions, several of the Twillingate Islands’ attractions are of outstanding quality (e.g. Prime Berth, Twillingate Museum, Long Point Lighthouse).

- Tourists, tour operators and government officials have cited All Around the Circle Dinner Theatre as one of the best dinner theatres in the province. As part of the provincial
government’s *Soiree and Times* stable of provincially promoted attractions, it’s helping to attract more and more visitors to the area.

- Operated for 22 years, the *Fish Fun and Folk Festival* is one of the more stable and successful festivals in the province attracting upwards of 8000 visitors annually for four days.

- The built heritage of the area has been well documented and offers a variety of styles and building types that have the potential for being an increasing tourism draw providing that steps are made to preserve and enhance existing structures of merit before they further disintegrate.

- Community and street names are unusual and could be a value added attraction if given appropriate signage and interpretation.

7.3 WEAKNESSES

7.3.1 General Comments

- Often local tourism operators develop a product based on their own needs or interests without understanding the tourism market’s needs or expectations. For tourism to be sustainable and grow, local tourism services and activities must match market needs and expectations. Twillingate Islands attract primarily a well-educated high-income clientele, but sometimes the product does not match those needs/expectations, particularly restaurants, bars, general infrastructure, and some B and Bs and some activities.

- The unplanned approach to tourism on Twillingate Islands has resulted in inconsistency of product. While tourism activities should cater to different interests and tastes, they should be of the same standard and quality.

- The existing lack of cooperation among many of the tourist operators or businesses sometimes manifests itself publicly during tourism season. This lack of professionalism can do irreparable harm to an otherwise good product.

- It is important to have good information on current visitors when planning and preparing tourism attractions, activities and services. No solid realistic information is available on the number of tourists visiting Twillingate Islands or the contribution of tourism activity to the region’s economy.

7.3.2 Land Use and Infrastructure

- Compounding the problem of municipal waste can be the presence of unsightly buildings and materials. While necessary for business, they can detract from one of the area’s main selling points, its scenic beauty. The entrance to the town of Twillingate is a case in point with its numerous automotive related businesses and the amount of parking and pavement in a small area. As previously indicated, a tourist’s first impression of a place is very important. Given that the town of Twillingate is known for its scenic beauty, among other positive attributes, the first impression is not a positive one.
One of several important and positive attributes of the Twillingate Islands tourism product is Twillingate Harbour, yet little has been done to build on that advantage.

7.3.3 Human Resources

- Few local tour operators have received any formal tourism training. While many individuals have learned on the job and often have neither the financing nor time for training, ongoing training is as equally important in the tourism business as it is in any other business. Sometimes small points can make or break a business or destroy/enhance a reputation.

- No tourism training programs are available in the region for residents, which means individuals must go away, take training on-line or import instructors.

- Despite some younger people recently entering the tourism/service business (e.g. restaurants), for the most part, younger people are not involved. In tourism, as is the case of all businesses, one always needs to build an industry for the future.

- Despite the efforts of TITTA, a general lack of awareness exists about tourism within the general population of the area, about the opportunities presented by tourism and about the realistic types of efforts, initiatives, activities and attractions that are needed to be undertaken to make it appealing to the type of visitors now frequenting the area.

7.3.4 Transportation

- Several major transportation issues face tour operators and tourists in travelling to Twillingate Islands. Motor coach tours have experienced ongoing difficulty in planning and delivering tours to Newfoundland because of the Argentia ferry’s unreliable schedule. This is particularly problematic in planning loop tours from St. John’s. The result is that many of the coach tours are planning west coast tours only, using the more reliable Port aux Basque ferry. This will cut down the number of bus tours coming to Twillingate Islands.

- Poor condition of the roads was one of the most common local tourism weaknesses cited by residents on Twillingate Islands who filled out an exit survey at the Community Input Workshop. In interviews with local tour operators, many of them pointed out that the condition of Route 340 has been a major deterrent to tourists coming to Twillingate, particularly those arriving by RV. Local tour operators indicated that many RV vehicles arrived with broken kitchenware as a result of large potholes in the roads, particularly near Gander Bay.

- Tourists and tour operators both indicated that lack of clear signage to Twillingate was also a problem as well as the absence of signs indicating upcoming bumps, sharp turns and intersections. Tourists also pointed out the absence of centre lines.

- The instability of the airlines as well as the high cost of travelling by air to Newfoundland is an overall deterrent to tourism that also affects tourism to Twillingate. Airfares between St. John’s and Gander are particularly prohibitive ($538.00).
7.3.5 Natural Tourism Attractions and Activities

- Countryside hiking and in town walking are increasing in popularity among general tourism/explorers, ecotourists and self guided tourists who want to experience culture and heritage. Twillingate Islands have begun the task of marking and interpreting trails connecting some of the more important natural attractions in the area, but it needs to be brought to a higher level of market-readiness in terms of trail development, signage and interpretation.

- No paths, signage and interpretation has been done within any of the towns or communities on Twillingate Islands which, to date, has been a missed tourism opportunity.

- A good quality, accurate interpretative map or maps of Twillingate Islands is lacking which would connect themes, icons, history and culture of the area with paths, roads and trails.

7.3.6 Cultural Tourism Attractions and Activities

**Built Heritage**

- Other than those individuals who are interested in maintaining their heritage structures or those organizations that have made the effort to preserve and protect their buildings, minimal concentrated effort has been made to preserve, protect and promote these structures. Many are becoming dangerously derelict. The situation is becoming more critical with the passage of time and Twillingate Islands are in danger of losing one of its most important attributes, the architectural heritage of the area.

**Museums and Archives**

- Tourists have limited time to spend in each museum, are not interested in duplication of artifacts and interpretation and will expect the same level of quality of interpretation at each location. Each of the museums has plans for future cataloguing, interpretation and expansion, but limited funds. Little coordination of effort occurs between the organizations in terms of activities, exhibits, cataloguing or services. It is important to the ongoing interest and longevity of these museums for them to differentiate the type of history and artifacts that are collected for each and to coordinate artifacts, activities and interpretation.

7.3.7 Existing Tourist Services

**Restaurants**

- The 1997 *Twillingate Historic Fishing Village Study* pointed out that tourists complained about the availability, quality and content of local restaurants. Newfoundland and local tour operators, as well tourists themselves, indicate that the situation remains unchanged today with poor quality and limited variety of food topping their list of weaknesses of the Twillingate Islands tourism product. The primary complaints include an over abundance of fried food, lack of fresh salads and fish, limited menu items reflecting Newfoundland’s culture (e.g. jigs dinner or items made with local berries) and lack of an upscale or atmospheric restaurant. Tour operators and tourist also noted the lack of coffee shops or small “stop in “ places to get a cup of coffee and a homemade bun or cookie. They also said that a small quality bar was lacking in the summer time.
Bed and Breakfasts and Inns
- The number of tourists to Twillingate Islands is increasing, but the number of quality B and Bs and small inns has not kept pace with demand resulting in the region losing valuable income.
- Ensuring that the quality and fit of services matches market needs and expectations is also becoming an issue. The majority of tourists visiting Twillingate are highly educated and high-income earners who have travelled extensively to other parts of Canada and the world. While they do not expect high end, they expect value as well as accommodations that reflect the culture and heritage of the region and not something reflecting Suburban Ontario. Several B and Bs and Inns have done this successfully in Newfoundland including Cape Onion B and B, Tuckamore Lodge, Quirpon Island B & B and Fisher’s Loft.
- While the number of B and Bs in the area with private baths is increasing, any future B and Bs must have private baths.
- Most B and Bs close down during the winter months and some B and Bs have no method of taking reservations during those months which also happen to be the months in which most tourists and tour operators are making summer vacation plans.

General Services and Infrastructure
- The 1997 study found that a lack of a municipal signage policy and good signage hampered the tourists’ ability to find attractions, accommodations, restaurants and other sites. The town’s only policy was that signs must be set back from the road so as not to interfere with vehicle traffic and road maintenance activity. A large town map is located on Toulinguet Road just before the town’s main intersection, but it is on the left side of the road and easily missed. Today, no municipal signage policy exists and an unsightly proliferation of signs has developed, particularly at the main intersection of town. This situation detracts from the overall scenic beauty of the area, which is the reason that many tourists visit Twillingate Islands.
- No heritage by-laws exist to protect the wealth of significant built heritage structures that are found in Twillingate and are important, and could be of greater importance, to the overall tourism product.

7.4 THREATS / BARRIERS

Threats or barriers are those events or occurrences over which a region has little or no control, but that could affect the tourism product. Outlined below are a few that are provincial, national or international in origin.
7.4.1 General comments

- World geo-political issues, declines in the North American stock market, increasing oil prices and a slow US economy will impact travel in the short-term.

7.4.2 Transportation

- Many of the transportation barriers have already been listed under weaknesses. They include:
  - The condition of the roads leading to Twillingate Islands is a deterrent to tourism, particularly to RVs and some tour buses.
  - Signage indicating the way to Twillingate is very poor particularly coming from Gander.
  - The schedule of the marine ferry system to Argentia is unreliable. As a result many tour operators are taking shorter hauls to the west coast coming and returning on the Port aux Basque ferry rather than taking the loop route (arriving in Port aux Basque and leaving from Argentia or vice-versa). The result is Twillingate’s removal from the itinerary as a scenic and worthwhile stopping point half way across Newfoundland.
  - Increasing costs of air ticket and declining air capacity will negatively impact tourists wanting to come to this province. This has been an ongoing tourism issue for many years.

7.4.3 Human Resources

- A threat exists that tourism products may be developed that do not match market demand due to lack of education about, and understanding of, market demand. This could result in tourism products being developed that have little market demand, are financial failures or lessen the tourism reputation of the area.

- There exists a lack of cooperation among some tourism operators and a lack of proactive support for the types of efforts required for tourism development on Twillingate Islands (e.g. heritage by-laws, beautification of the entrance to Twillingate) that becomes a barrier to development if it continues.

- A declining population base, an exodus of young people and minimal young people entering the tourism industry represent a serious barrier to developing ongoing sustainable tourism.

- Growing competition in the tourism industry, especially among locations where a coordinated effort among tourism operators has produced a product of quality and value, presents a threat to tourism development on Twillingate Islands if a plan and coordinated effort to implement that plan does not evolve.
7.5 OPPORTUNITIES

The existing tourism product on Twillingate Islands has been considered a “diamond in the rough” by the Department of Tourism, Culture and Recreation. In other words, the basic structure and product is good and does not need to be significantly altered, but rather enhanced. For the most part, it involves “tweaking” rather than substantial change. Most of the opportunities identified are based on knowledge of the market and recognition of weaknesses and gaps in the existing tourism product and marketing. Many of the opportunities have to do with a planned approach to tourism development. In other words “managing” the tourism product rather than haphazardly letting it happen. Other opportunities include enhancement of existing attractions (e.g. hiking trails, heritage buildings and the waterfront), better packaging existing sites and attractions (theming, interpreting, connecting, matching product to market), filling in service gaps so that they match market needs (e.g. more upscale B and Bs and high quality small inns, small upscale seasonal restaurants, bars and coffee shops) and improved municipal services to meet tourism demand (e.g. better signage, user friendly entrance to the town, a designated centre for all tourism information).

Opportunities form the basis of the actual Twillingate Tourism Master Plan and, as such, are dealt with in detail in Volume II.
Glossary of Terms

**Adventure Tourism**: Tourism that involves physical exertion, usually in the outdoors.

**ACTP**: Atlantic Canada Tourism Partnership - a marketing alliance involving ACOA, the four provincial departments of tourism and the four provincial tourism industry associations.

**Authentic cultural/heritage product**: A tourism product that is to a large extent a genuine cultural feature or a genuine heritage artifact, rather than one that is that is contrived. It involves restoration rather than replication. It is original rather than representational.

**Collateral**: Print materials used in marketing, such as brochures, flyers, information sheets, etc.

**Commission**: The compensation that a travel agent or other intermediary receives from a product supplier in return for selling their products or services. Commissions are usually based on a percentage of the retail value of the transaction.

**Consumer Show**: A travel-related show designed for consumers.

Cooperative Marketing: The sharing of marketing costs for mutual benefit. Participants in a cooperative marketing initiative may include one or more travel product suppliers, a destination marketing organization, and travel trade companies such as tour operators or wholesalers. Usually all participating organizations share in the administration and/or cost of the marketing program.

**CTC**: Canadian Tourism Commission

**Customer Orientation**: A business philosophy whereby you give the needs and wants of your customers first priority in how you operate your business.

**Destination Marketing Organization (DMO)**: An organization that promotes a travel destination - including provincial tourism departments, regional tourism associations, convention and visitors bureaus, and chambers of commerce.

**Direct Selling**: A method of securing business through direct, personal contact with potential customers.

**Direct Marketing**: The use of marketing media that involves contact directly with individual customers and prospects. This includes mail and email that is sent directly to the individual.

**Eco-tourism**: Tourism that involves experiencing and learning about the natural environment, conducted in an environmentally sensitive and sustainable fashion.

**Familiarization or "FAM" Tours**: A complimentary or reduced-rate travel program for tour operators, travel agents or travel writers, designed to improve knowledge about a particular destination or package. The purpose in the first two cases is to encourage active marketing support; in the third it is to encourage favourable media stories about the destination.

**Fulfilment**: The practice of sending out travel literature in response to enquiries.
**Fully Independent Tour/Travel (FIT):** Packaged travel/tourism products that are designed for independent travellers and that do not usually involve group activities at any stage in the trip. A typical example is the fly-drive package, offering a saving in air, car rental and perhaps some additional services on a package basis.

**Geographic Markets:** Market segments defined by place of residence. This is the primary segmentation method used in general travel advertising targeting the touring and 'explorer' markets discussed in this report. It is also generally used as a sub-segmentation method in other markets.

**Infrastructure:** Travel support systems and services - roads, highways, transportation services, information services, etc.

**Learning/Enrichment Travel:** Leisure travel that involves structured instruction and learning as part of the trip.

**Travel Trade Marketplace:** A trade show where tourism suppliers have scheduled appointments with tour operators and other travel trade buyers.

**Market-Readiness:** The state of preparedness of a tourism operation, or a destination as a whole, in meeting the expectations of its customers. It refers to the whole spectrum of things affecting customer satisfaction - quality of facilities and services, range of services provided, information services, business policies and practices that affect the customer directly or indirectly, etc. It can also refer to the state of preparedness in meeting the needs and expectations of the travel trade.

**Market Segments/Segmentation:** The definition of segments of the marketplace in which the members of the target audience share like characteristics. Market segmentation is usually done on the basis of one or more of the following; purpose-of-trip/travel, geographic area, demographics, psycho-graphics (interests, values), and travel mode.

**Media:** Communications tools available in reaching target audiences.

**Media Relations:** The effort to obtain publicity or stories published about your destination or product from the media.

**Motorcoach Tour:** A group tour in which the primary mode of transportation is by motorcoach.

**Niche markets:** Specialized market segments that can be narrowly defined, usually because of avid interests. An example would be avid birdwatchers who are prepared to travel for that activity.

**Package:** A pre-arranged combination of travel components "packaged" together and sold at an all-inclusive price in a single transaction.

**Paid Media:** Media advertising that is paid for rather than obtained free as publicity.

**Positioning:** The manner in which a product or service is presented to the consumer in marketing materials that draws attention to its unique appeals to targeted market segments.
Primary Research: The collection of original information, usually obtained from customers or users of a business’ product. Common techniques include mail surveys, telephone surveys and personal interviews.

Public Relations: Activities that involve you in the affairs of the community, in order to maintain and improve the image of your business.

Purpose of Trip/Travel: A form of market segmentation based on the reason for travel.

Receptive Operator: A company that specializes in particular destinations, providing services at the destination to group travel organizers and tour operators. Some limit their services to the community and area in which they are based; others provide services to entire regions.

Sales Promotion: Promotional activities that are neither media advertising nor personal selling; for example, offering free samples or discount coupons, staging contests, exhibits or displays, and attending consumer trade shows.

Secondary Research: The compilation of existing data, drawn from such sources as internal reports, newsletters, trade journals, and so on.

Special Interest Market: A market segment based on a common interest in a specific subject or activity.

Target Markets: Market segments that have been identified as having the greatest potential, and towards which marketing activities are directed.

TDMS: The tourism destination management system in use on a province-wide basis in Newfoundland and Labrador. It involves the provision of travel information to consumers via a call centre and literature fulfilment service.

Tour Operator: A business that designs, develops, markets and operates packaged travel and tourism products and tours. Tour operators sell through travel agents and/or directly to consumers.

Trade Show: An exhibition of travel and tourism products designed to solicit business from travel trade buyers.

Travel Agent/Agency: A licensed travel product retailer that provides travel information, reservations and other forms of assistance to consumers, companies and groups in making travel arrangements. Sometimes referred to as a ‘retailer’.

Travel Party: People travelling together, for example; a couple, a family or group tour.

Travel Suppliers: Tourism operators.

Travel Trade: A term describing the various types of organizations that operate as intermediaries in the travel and tourism industry. These typically include tour operators, wholesalers, receptive operators, and travel agents.

Unique Selling Propositions (USPs): The unique characteristics and experiences of a travel product or package that are used to promote and sell it.
**Wholesaler**: A company that operates as an intermediary between the travel product supplier and the retail travel agent in the marketplace, generally providing services such as information and reservations to travel agents. Tour operators are a common example. So are central reservation systems, online booking systems, representation companies, sales agents, etc.
1.0 REGIONAL CONTEXT

1.1 INTRODUCTION

This section describes Twillingate Islands with regard to their location and administration, environmental setting and socio-economic profile.

1.2 LOCATION

Twillingate Islands are located in Notre Dame Bay in the central region of the province. The North Island is located at 49 40 N (5504170 N) and 54 45 W (21659204 W); the South Island is located at 47 45 N (5499801N) and 53 15 W (21663777 W). Islands of various sizes surround the area, the largest being New World Island to the south. Other islands include Trump Islands, Dunnage Island, and Dog Island to the south; Change Islands and Fogo Island to the east, and the Exploits Islands to the southwest. Numerous other tiny islands exist in the area.

This study includes North and South Twillingate Islands. Twillingate, the largest municipality in the study area, is located on both South and North Island; Crow Head, a much smaller municipality, is located on the northern part of North Island. The area (both North and South Islands) encompasses 38 Km². The municipality of Twillingate includes 11 communities located on both the North and South Islands. In addition, one local service district and four unincorporated settlements are located on South Island.

1.3 ENVIRONMENTAL SETTING

Geography
Both North and South Twillingate Islands lie within the Northshore Ecoregion. Numerous irregular coves, bays and inlets characterize the Islands and extend inland in a southwesterly direction. Although much of the inland region is forested, forest cover decreases along the coast and barren areas are more common.

Climate
The highest temperatures occur between June and September; the lowest between December and March, with the greatest variability in January and February. The annual mean temperature is 4.4°C. The average monthly temperatures range from –5.8°C in February to 15.8°C in July.

Annual mean precipitation in Twillingate is 941.9 mm with 661.7 mm of that being rainfall and the remainder, 282.5 mm, being snowfall. The months between August and October receive the greatest rainfall and the months between December and February receive the greatest snowfall. Mean monthly precipitation is highest between October and December. Annually, Twillingate receives an average of 154 days of precipitation.

The closest available recorded data for bright sunshine hours occurs in Gander; Twillingate has no sunshine data available. The greatest amount of bright sunshine hours occurs in July with 214.2 hours, followed by August with 186.3 hours and June with 183.6 hours. The least amount of bright sunshine hours occurs in November (66.6) and December (68.5).

The proximity of Twillingate to the Atlantic Ocean results in snow, fog and freezing drizzle. However, this ecoregion occasionally has warmer summers than other eastern and northern coastal areas of Newfoundland as a result of the prevailing winds from the west to south range where the longest growing seasons on the island exist.
Ice cover affects local weather conditions in Twillingate. Arctic pack ice is common from early February to mid-May. From mid-February to early April, shore based ice is common in sheltered bays and inlets.

**Icebergs**

The East Coast of Newfoundland can be a high traffic area for many icebergs in their journeys south from the fjords of Greenland. Icebergs are masses of fresh water ice, which calve each year from the glaciers along West Greenland. Icebergs are moved by both the wind and ocean currents, and typically spend one to three years travelling a distance up to 1800 miles to the waters of Newfoundland. The West Greenland and Labrador Currents (Figure 1) are major ocean currents, which move the icebergs about the Davis Strait, along the coast of Labrador, to the northern bays of Newfoundland, and to the Grand Banks. Icebergs will exhibit little or no melting in sea temperatures of about 5° C or less while waves and warm air temperatures will tend to erode them in their travels. Generally larger icebergs can survive until late into the summer as they reach Newfoundland.

While each year is different, icebergs will typically appear off the coast and northern bays of Newfoundland by February or March. The presence of easterly and northeasterly winds can strongly influence the number of icebergs that make their way into the coast. Once there, the icebergs may become grounded or become trapped in sea ice. These factors combined with the prevailing wind directions and sea and air temperatures will determine whether and for how long the icebergs stay along the coast. The majority of icebergs will be present from April to June or July. By July or August in most years, the icebergs along the coast of Newfoundland will have drifted south of the Grand Banks or melted.

The U.S Coast Guard International Ice Patrol (IIP) has monitored the number of icebergs crossing 48° N (about 110 km south of Twillingate and Notre Dame Bay) since 1914 as part of its core purpose to promote safe navigation of the Northwest Atlantic Ocean where the danger of iceberg collision exists. The number of icebergs that crossed 48° N since 1946 is highly variable. Figure 1 illustrates the inter-annual variability in this total. In 1984 over 2,200 icebergs were recorded crossing 48°N whereas in 1977 and 1999, just 22 icebergs crossed 48°N. In the period 1946 to 2000 on average 1007 icebergs crossed 48°N. In 1999, while there were a good number of icebergs on the East Coast, most of them actually drifted south and west through the Strait of Belle Isle at the northern tip of Newfoundland.
Geology
The Islands consist mostly of exposed bedrock and shallow soil cover. Both Islands lie within the Dunnage zone that consists primarily of material from an ancient ocean floor and a series of volcanic islands that formed approximately 480 million years ago. The Notre Dame Bay coastal areas consist mainly of volcanic rocks, porphyries and intrusive rocks of the Silurian and Ordovician age, making them 400 to 500 million years old.

Coastal Geomorphology
The Islands' shoreline has numerous beaches with moderately sloping bedrock cliffs. The beaches are comprised of sand to cobble and boulder size materials. Waves are high in exposed location, but low in the more sheltered or protected areas.

Soils
The area's soils are sandy to silty and are poorly graded with the dominant soils being podzols. Two principal soil associations exist: Twillingate and Indian Island. Soils of the Twillingate soil association are morainal till deposits, brown and organic, stoney and rocky, and common on moderate slopes. Although found mainly under coniferous and mixed forest vegetation, they also occur under shrub vegetation which is common in the area. Soils of the Indian Island association are marine deposits, dark coloured with a high organic content, consist of little stones and rocks and are associated with gentle slopes. They are found under shrub vegetation in barren areas.
Vegetation
Twillingate Islands have numerous common and indigenous tree and plant species. The principal tree species on both Islands are black spruce and balsam fir, although both mountain alder and speckled alder are plentiful. Although no rare plant species exist on the Islands, several rare vascular plants are found including the purple crowberry, as indicated in Table B1.

Table B1 - Rare Vascular Plants found on North and South Twillingate Islands

<table>
<thead>
<tr>
<th>Rare Plant Species</th>
<th>Newfoundland Rarity</th>
<th>Habitat</th>
<th>Indigenous</th>
</tr>
</thead>
<tbody>
<tr>
<td>Antennaria straminea</td>
<td>S2</td>
<td>Dry gravelly limestone and exposed basic rock barrens</td>
<td>Not indigenous</td>
</tr>
<tr>
<td>Botrychium simplex</td>
<td>S2</td>
<td>Turfy slopes, rocky crests and ledges</td>
<td>Not Indigenous</td>
</tr>
<tr>
<td>Carex abdita</td>
<td>S2</td>
<td>Exposed, barren siliceous summits; gravely terraces along rivers</td>
<td>Not indigenous</td>
</tr>
<tr>
<td>Cystopteris laurentiana</td>
<td>S1</td>
<td>Crevices and ledges of calcareous escarpments</td>
<td>Not Indigenous</td>
</tr>
<tr>
<td>Empetrum atropurpureum</td>
<td>S2</td>
<td>Exposed turfy Empetrum heath along the coast</td>
<td>Purple crowberry, indigenous</td>
</tr>
<tr>
<td>Festuca saximontana</td>
<td>S2</td>
<td>Usually on dry limestone talus, cliffs, ridges and barrens</td>
<td>Not Indigenous</td>
</tr>
<tr>
<td>Osmorhiza depauperata</td>
<td>S2</td>
<td>Edge of coniferous woods and thickets</td>
<td>Not indigenous</td>
</tr>
</tbody>
</table>


S1- Plants are critically endangered on the island of Newfoundland due to their extreme rarity (5 or fewer occurrences or very few surviving individuals or hectares) or factors(s) making the taxon particularly vulnerable to extirpation on the island.

S2- Threatened on the island of Newfoundland due to their extreme rarity (6 to 20 occurrences or very few surviving individuals or hectares) or factor(s) making the taxon particularly vulnerable to extirpation on the island.

In addition, the shoreline and wooded areas contain many plants commonly found in Newfoundland. Along the shoreline, seaweed, lichens, succulent-leaved sea Mertensia and sea rocket are found and along the hillsides common shrubs such as rhodora, sheep laurel and Labrador Tea are present. In the gently sloping shrubby area edible plants include the blueberry, raspberry and bakeapples. The wooded areas contain crackerberry, star-flower, and twin-flower while bogs and marshes are hosts to the bakeapple, pitcher plant and sundew. Small ponds and watering holes contain water lilies and yellow bullhead lilies (TITA, 2000).

Birds
Very little documentation has been done on birds found in the area. Manx Shearwaters and British Storm-petrels may nest in the Notre Dame Bay Islands, a rare location for this species. Thick-billed Murres and Common Murres are harvested by local hunters in the late fall and winter. The eastern portion of Notre Dame Bay is home to a number of seabird colonies including an estimated 488,000 pairs of breeding seabirds. Other breeding species include
Northern Fulmar, Leach’s Storm-petrel, Northern Gannet, Common Eider, Common Black-headed Gull, Black-legged Kittiwake, Caspian Tern, Common Tern, Arctic Tern, Common Murre, Black Guillemot and Atlantic Puffin. Some species only occasionally found in the area include Mew/ Common Gull, Little Blue Heron, Pomarine Jaegers, Parasitic Jaegers, Great Blue Heron, Boreal Owl, Snowy Owl and Purple Martin (Beaton Sheppard Associates Limited, 1997).

Terrestrial Wildlife
Small common mammals such as the Snowshoe Hare, as well as shrews, beavers, Meadow Voles, European bank vole, rats, house mice and weasels make up the terrestrial wildlife on the Islands.

Marine Life
The Notre Dame Bay area is home to cod, redfish, thorny skate, American plaice, three species of wolfishes, Greenland halibut, witch flounder, roughhead, grenadier, Vhal’s eelpout and lobster. Salmon, mussels and seaweed are also found in the area. (Beaton Sheppard Associates Limited, 1997)

1.4 SOCIO-ECONOMIC PROFILE

1.4.1 Archaeology, History and the Local Economy

Twillingate Islands have a vast, rich and varied history. Artifacts found in the area indicate that Dorset Eskimo and Maritime Archaic people inhabited the Islands as far back as 1500 BC. The Curtis Site located in Back Harbour is a Maritime Archaic Burial Site, excavated by Don McLeod from 1966 to 1969. Mr. McLeod identified several sites while working in the area. Other sites include artifacts from Dorset Eskimo period as well as from recent Indian and European cultures (TITA, 2000).

Traces of the Palaeoeskimo who existed around 1000 BC have been found in the area as well as the Beothucks who inhabited Newfoundland until 1829. Shanawdithit, the last known Beothuck who died in 1829, came from the area, as did her aunt, Demasduit (also known as Mary March) who was captured by John Peyton, a resident of Twillingate. He placed her under the care of Rev. John Leigh of the Church of England in Twillingate, but she died of tuberculosis in 1820 before she could be returned to her people. Nearby Boyd’s Cove is home to the largest Beothuck site in Newfoundland.

Twillingate, first called “Toulinguet”, is one of Newfoundland’s oldest fishing towns. First settled in 1700 by the English, it is believed to have been frequented by fishing vessels from France and England before that time (TITA, 2000). By 1739, 152 people were wintering on the Islands and by the 1850’s, the population of Twillingate had increased to approximately 3000 people. By 1891, the census recorded 3528 people and in 1932 the population had stabilized at 3500 (TITA, 2000).

Commercial ventures were first recorded in 1760 when two merchants established themselves in the town of Twillingate, the Noble family and John Slade (TITA, 2000). John Slade’s business was taken over by the Owen’s and Earles and later by the Ashbourne’s. In the mid to late 1800’s and early 1900’s, Twillingate was referred to as the “Metropolis of the North”, was the centre of business and government on the Northeast Coast and had become the fourth largest town on the Atlantic Coast of Newfoundland (TITA, 2000). The area boasted a strong inshore fishery and also served as an important stopover point for Newfoundland fishermen heading to Labrador for the summer fishery. Other commercial establishments included the
Duder’s, the Hodge’s and the Manuel’s, some of whose premises are still standing or operating today.

As was the case in many areas of Newfoundland, the Beothuck Indians already occupied the islands but the settlers disregarded any rights the Indians had to the fishing and hunting grounds. Disputes occurred but the English remained firm in their possession of the fishing and hunting grounds. Today, Twillingate still remains primarily a fishing community.

Sealing was also important as it provided the people with a source of income and food during late winter and early spring. 1860 was the height of the sealing industry with the “The Great Seal Haul”. In March of that year, Twillingate saw a large number of seals come to land, with 30,000 seals being taken by the men of Twillingate. Often this was the only source of income other than dried fish, but all the dried fish was owed to the merchants at the end of the season. Sealing was an integral part to the survival of the people on Twillingate Islands.

In 1924 the Notre Dame Bay Memorial Hospital opened its doors to serve the people of Notre Dame Bay. The present day hospital was built in 1976, serves Notre Dame Bay and employs 130-140 people. The other major employer is the fish plant. Built in the 1960’s by Fishery Products International, it has had a succession of owners including Compak Seafoods and Twillingate Seafoods. The plant has been closed for approximately ten years, but was re-opened in 2002 by Notre Dame Seafoods based in Comfort Cove. Originally built to process cod, it now operates approximately five months of the year primarily processing shrimp. Approximately 120 people are employed at the plant on a part-time and full-time basis. The tourism industry, which includes inns and B and Bs, restaurants, boat tours, museums and other attractions and activities directly employs approximately 120 people on a full-time and seasonal basis. Based on the fact that some of these people are employed year round, tourism ranks as the second largest employer on Twillingate Islands.

Population

Over the past ten years with the close of the inshore fishery in 1990 and the resulting cod moratorium, Twillingate, like many communities in Newfoundland, has seen a decline in population and an increase in the out-migration rate. According to Newfoundland Statistics Agency from 1991 to 1996, Twillingate saw a population change of −5.9% (the average for Newfoundland is 6.4%) and an out-migration rate of −5.9% (the average for Newfoundland is 8.2%). Although the decline is below the average for the province, it is still significant.

<table>
<thead>
<tr>
<th>Year</th>
<th>POPULATION</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1991</td>
<td>3,103</td>
<td>N/A</td>
</tr>
<tr>
<td>1996</td>
<td>2,826</td>
<td>−4.8</td>
</tr>
<tr>
<td>2001</td>
<td>2,611</td>
<td>−7.6</td>
</tr>
</tbody>
</table>

Source: Statistics Canada.

In 1996, the Statistics Canada recorded population for Twillingate was 2,826 and in 2001 it was 2,611. This indicates a population change of −7.6% from 1996 to 2001.
Employment and Income

The area is characterized by a significant portion of seasonal and/or part-time jobs, high unemployment rates and low personal incomes. According to the Newfoundland Statistics Agency from 1990 to 1998 the average personal income levels for Twillingate was approximately $12,000 to $13,000 and the unemployment rate was 30.6% in 1996.

Self-employment in the fishery was a major source of employment for 1998.

The change in labour force activity from 1993 to 1996 was -12.9% with the average being -12.0% and the employment insurance incidence for 1998 was 52.3% with the average being 55.9% for a community in Newfoundland.

Table B3- Employment Insurance Incidence 1992-1998

<table>
<thead>
<tr>
<th>Year</th>
<th>Employment Insurance Incidence (% of Population)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1992</td>
<td>64.0</td>
</tr>
<tr>
<td>1993</td>
<td>55.9</td>
</tr>
<tr>
<td>1993</td>
<td>54.6</td>
</tr>
<tr>
<td>1995</td>
<td>52.6</td>
</tr>
<tr>
<td>1996</td>
<td>48.7</td>
</tr>
<tr>
<td>1997</td>
<td>46.2</td>
</tr>
<tr>
<td>1998</td>
<td>52.3</td>
</tr>
</tbody>
</table>

Source: Newfoundland Statistics Agency.

Occupancy Rate

The total number of available rooms, for the months of June to September, in the Twillingate/Fogo area (Economic Zone 14, Sub-region 3.2) has decreased over the past three years from 9,670 available rooms in 2000 to 6,953 in 2002, a decrease of 28%. In 2000, 4,166 rooms were sold in the Twillingate/Fogo area (Economic Zone 14, Sub-region 3.2), an occupancy rate of 43.08% while in 2002, 3,893 rooms were sold with an occupancy rate of 55.99%.

Table B4 – Occupancy Rate for the months of June to September 2000-2002

<table>
<thead>
<tr>
<th>Year</th>
<th>Month</th>
<th>Total Rooms Available</th>
<th>Total Rooms Sold</th>
<th>Occupancy Rate %</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>June</td>
<td>2400</td>
<td>796</td>
<td>33.17</td>
</tr>
<tr>
<td></td>
<td>July</td>
<td>2480</td>
<td>1502</td>
<td>60.56</td>
</tr>
<tr>
<td></td>
<td>August</td>
<td>2480</td>
<td>1254</td>
<td>50.56</td>
</tr>
<tr>
<td></td>
<td>September</td>
<td>2310</td>
<td>614</td>
<td>26.58</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>9670</td>
<td>4166</td>
<td>43.08</td>
</tr>
<tr>
<td>2001</td>
<td>June</td>
<td>2160</td>
<td>874</td>
<td>40.46</td>
</tr>
<tr>
<td></td>
<td>July</td>
<td>2232</td>
<td>1346</td>
<td>60.30</td>
</tr>
<tr>
<td></td>
<td>August</td>
<td>2232</td>
<td>1174</td>
<td>52.60</td>
</tr>
<tr>
<td></td>
<td>September</td>
<td>1950</td>
<td>475</td>
<td>24.36</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>8574</td>
<td>3869</td>
<td>45.12</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------</td>
<td>-------</td>
<td>-------</td>
<td>-------</td>
<td></td>
</tr>
<tr>
<td>June</td>
<td>1830</td>
<td>700</td>
<td>38.25</td>
<td></td>
</tr>
<tr>
<td>July</td>
<td>2057</td>
<td>1457</td>
<td>70.83</td>
<td></td>
</tr>
<tr>
<td>August</td>
<td>1743</td>
<td>1273</td>
<td>73.03</td>
<td></td>
</tr>
<tr>
<td>September</td>
<td>1323</td>
<td>463</td>
<td>35.00</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>6953</strong></td>
<td><strong>3893</strong></td>
<td><strong>55.99</strong></td>
<td></td>
</tr>
</tbody>
</table>

Source: Department of Tourism, Culture and Recreation, Strategic Planning and Policy Division.

Information specific to Twillingate Islands is not available, but all accommodation units in Twillingate reported a significant increase in rooms sold during 2002 and a modest increase in rooms available between 2000 and 2002, which means that this decrease in rooms available and rooms sold occurred in other parts of the Twillingate/Fogo area. It should be noted that despite fewer rooms available in 2002 than 2001 and 2000, the number of rooms sold in August 2002 was up from the previous two years and the number of rooms sold in July 2002 was up from the previous year and only down slightly from 2000. This data suggests that demand for accommodation, and likely overall tourism visitation, has been increasing in the Twillingate Islands area.

1.5 ADMINISTRATIVE AND REGIONAL STRUCTURES AND ASSOCIATIONS

Two municipalities exist in the study area, Twillingate with a population of 2,611 people and Crow Head with a population of 218 people (2001 Census). The municipality of Twillingate, with six councillors and a mayor, includes the town of Twillingate and the former communities of Bayview, Durrell, Back Harbour, Wild Cove, Gillesport, Hearts Cove, Upper Jenkins Cove, Lover Jenkins Cove, Blow Me Down and Paradise. Bayview includes the former communities of Bluff Head Cove, Manuels Cove and Gillard’s Cove. Purcell’s Harbour, a local service district, is administered by five members including a chairman, vice chairman, secretary and treasurer. Unincorporated settlements include the communities of Ragged Point, Kettle Cove, Black Duck Cove and Little Harbour.

All of the services, infrastructure and tourism activity of the municipality of Twillingate is shared by the local service district of Purcell’s Harbour and all other unincorporated areas on both the North and South Islands.

Twillingate Islands fall within the federal riding of Gander-Grand Falls District, which is represented by Mr. Rex Barnes of the Progressive Conservative Party and the provincial riding of Twillingate-Fogo, which is represented by Mr. Gerry Reid of the Liberal Party who is also the Minister of Education.

Twillingate North and South Islands are part of the Kittiwake Economic Development Zonal Board (Zone 14), which encompasses an area of 13,167 Km²; spans the northeast coast from the community of Terra Nova west to Lewisporte and north to Fogo Island and has its head office in Gander. Twillingate is one of the six largest towns in this zone. The philosophy of this Zonal Board is to help stimulate sustainable, effective economic development using public consultation and participation as an essential tool. The primary focus of this zonal board is the development of the commercial fishery, information technology, mining, agrifoods, forestry, youth and aquaculture.

The Twillingate, New World Island, Change Islands Development Association represents the community economic development interests of the area and has an office and tourism
information centre in Newville, New World Island. The primary focus of the organization is to promote rural economic growth in the area.

Twillingate Islands are located in the Northeast tourism region of the province and come under the aegis of the Kittiwake Coast Tourism Association based in Gander. The Association’s mandate is to help develop and promote Northeast Newfoundland as a tourism destination. This is done through helping to support local tourism organizations; promoting the area through guidebooks, leaflets, newspaper and a web site, and attendance at various trade shows.

The local tourism association is the Twillingate Islands Tourism Association (TITA). Formed in 1995, its mandate is to develop and promote tourism on Twillingate Islands. The Association has initiated and supported many tourism initiatives on the Islands including the recent construction of trails, interpretative panel displays and a viewing platform at the Long Point Lighthouse, an annual tourism information seminar for local tourism operators, tourism surveys and management of this tourism Master Plan.

1.6 LAND USE AND INFRASTRUCTURE

Tourism planning needs to be coordinated with appropriate design and land use plans. The following table identifies by-laws found in many municipalities that have direct relevance to tourism development, and comments on whether these by-laws are in place within the study area

<table>
<thead>
<tr>
<th>Municipality</th>
<th>Protected Areas of Land (parks or Archaeological Sites)</th>
<th>Protected Buildings or Historic Structures</th>
<th>Signage Laws</th>
<th>Beautification Plans/Keeping the Village Clean/Waste Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Twillingate</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>✺ ✺ Tidy Towns</td>
</tr>
<tr>
<td>Crow Head</td>
<td>Sleepy Cove Park</td>
<td>No</td>
<td>No</td>
<td>✺ ✺ Clean up time each year from April-May</td>
</tr>
</tbody>
</table>

Source: AMEC

Tourism planning also needs to be coordinated with the carrying capacity of municipal infrastructures and services (e.g. water and sewerage, garbage collection, street lighting, fire protection and departments, road maintenance and sport and leisure facilities). The following is a synopsis of those services as they relate to tourism in Twillingate.

Electricity
Electricity is provided through Newfoundland Light and Power. This is a reliable source of power for the area and sufficient supply is available to meet an increased demand as a result of increased visitors to the region.

Water
Water is provided to the municipalities of Twillingate and Crow Head through a municipal water system. Both municipalities indicate that a sufficient and reliable volume of water is available to meet an increase in tourism. However, Twillingate policymakers suggest it would have water
supply concerns if another large business such as a fish plant started up in the town. Other communities on the Islands receive their water from private wells. Water analysis is conducted each year by the Department of Environment. Although the results are so far positive, Twillingate has indicated that at certain times of the year a yellowish colouring occurs in the water. This could be off putting to tourists.

**Sewage**
Adequate sewage disposal is necessary to prevent pollution of local ground or surface waters and to avoid the presence of undesirable odours. Approximately 85% of Twillingate and 98% of Crow Head are hooked up to a sewage system. In Twillingate, those not on the system have their own private septic systems, but plans exist to have them added to the town’s system. The town of Twillingate indicated that service in the older homes is good as well. In Crow Head, those not on the system have their own septic systems, but plans also exist to add them to the community’s system. Crow Head is also seeking government funding to add Mutford’s Cove to their system. Areas not on a municipal sewage system have septic systems whose drainage goes to the ocean.

Other communities and settlements on the two islands are not hooked up to the centralized treatment systems and use instead septic tanks that might not meet today’s accepted environmental standards. New homes built are required to have approved septic tanks that meet environmental standards.

**Solid Waste Disposal**
The municipality of Twillingate has had a landfill site and incinerator since the 1980’s; a new incinerator was installed in 1995. All domestic garbage from the municipalities of Twillingate and Crow Head, the local service district of Purcell’s Harbour and unincorporated areas go to this landfill. All residents pay a fee to the town of Twillingate for its use. An isolated section of the landfill has been designated for metals and all refrigerators, stoves, freezers, car wrecks, etc. are placed there for recycling. A private company removes and recycles the metals. Used tires are also stockpiled at the site until they can be recycled through the governments recycling program. There is also a green depot in operation in the town of Twillingate.

Similar to many rural Newfoundland and Labrador communities, the communities on Twillingate Islands are facing an increasing problem of waste management. Distance from major centres and the geological landscape are serious impediments to the capacity of these communities to absorb the growing amount of packaging and hazardous waste. Hard bedrock prevents communities from building landfill sites resulting in most waste being incinerated in unlined, open pit dumps. It will be important to ensure that tourism development does not place more pressure on the area and the two municipalities’ ability to handle solid waste.

**Unsightly Materials**
Compounding the problem of municipal waste can be the presence of unsightly buildings and materials. While necessary for business, they can seriously detract from a region’s overall attractiveness as a tourism destination. An entrance to a town is the first impression that tourists receive. Everything should be done to ensure a first good impression of Twillingate. To date, little has been done with the exception of one welcome sign.

There are ongoing initiatives in both Twillingate and Crow Head to have car wrecks removed. The municipality of Twillingate pays a private contractor to remove local car wrecks own. The owner of the vehicle is then charged half the cost of the removal, but the owner must agree to
have the wreck removed before the town proceeds. In Crow Head car wrecks are removed annually.

**Telecommunications**

Phone lines link all of the communities on Twillingate Islands and cell phone service is available. Internet connections are available on regular phone lines over fibre-optics or through a cable modem. A regular phone line makes the connection slower at times. Six public pay phones are available in the area, but this number is insufficient during tourism season.

**Drainage**

In some of the areas around the heads of bays and coves as well as the bogs and rivers, drainage can occasionally be a problem. Improper drainage, particularly in ditches that fill up with stagnant rainwater, can become a breeding ground for flies and a deterrent to tourism.

In Twillingate, drainage from problem ditches has been alleviated by the installation of culverts and trenching to the ocean. In Crow Head some problems occur with drainage, but not to the extent that the roads become washed away.

### 1.7 HUMAN RESOURCE DEVELOPMENT FOR TOURISM

Twillingate Islands have been a tourism destination for many years. A large motel has existed there since 1972 and bed and breakfasts have been operation in the area at least since 1991. Nonetheless, lack of education and training for tourism has been cited as a weakness by existing Newfoundland and mainland tour operators as well as by some tourists. This section provides an overview of existing resources to support human resource development in tourism.

In the area, no formal programs exist leading to a recognized degree or certification in tourism. TITA has offered a one-day program for local tourism operators and employees to acquaint them with the history, flora and fauna of the area as well as some of the natural and cultural attractions. The Kittiwake Coast Tourism Association is available to help support tourism initiatives, but provides no formal training. Hospitality Newfoundland and Labrador, the provincial tourism industry association that is headquartered in St. John’s, offers a number of tourism professional development programs including self-directed study programs, training consultations, training videos, tools to obtain national occupational standards in tourism related trades, tourism business development and tourism business development resources. They offer workshops and seminars in the following areas:

- It’s Good Business – Responsible Alcohol Service
- Excel Food and Beverage Server Workshop
- Value Added customer Service
- Teamwork Skills
- Mature Consumer
- Train the Workplace Trainer
- First Things First – Time Management Skills
- Customer Communication Skills
- Introductory Sales Skills.

HNL also offers certificates in a number of occupations including:

- Bartender
- Food and beverage server
- Guest services attendant
- Local tour guide
- Special events manager
- Tourism visitor information counsellor
- Beverage services manager
- Banquet server
- Heritage interpreter
- Reservations Sales Agent
- Taxicab Driver
- Wine Server
- Campground operator
- Freshwater angling guide
- Housekeeping Room Attendant
- Sales manager
- Tour Director
- Director of Sales and marketing
- Front Desk Agent
- Hunting Guide
- Special Events Co-ordinator
- Tourism Trainer

The College of the North Atlantic offers the following courses in tourism at their St. John’s campus: Adventure Tourism, Tourism – General, Tourism - Hospitality and Tourism – Travel.

Specific associations (e.g. canoeing) or private companies (e.g. kayaking, scuba diving) offer certificate training in their field of expertise. Most of this instruction is provided in St. John’s, but with field trips to other parts of the province.

Some local Twillingate Islands tourism operators have either had on-the-job training at national hotel and restaurant chains and could offer informal training to other local operators or sit on the executive of tourism associations and could also provide guidance and assistance.

The Department of Tourism, Culture and Recreation offers guidance in product development, marketing, visitor services, tourism planning and research, and on touring and motor coach market segments. The Department also has a regional tourism development officer located in Gander who works closely with all tourism associations and businesses in central Newfoundland. The Special Celebrations Office of the Department of Tourism provides guidance and expertise in a variety of areas including event management, dinner theatre and events and attractions. The Department of Industry, Trade and Rural Development also helps in business development and start-ups. The Atlantic Canada Opportunities Agency (ACOA), Human Resources Development Canada (HRDC) and Heritage Canada also offer guidance and support some training initiatives.

1.8 TRANSPORTATION

A critical component of any successful tourism industry is easy, affordable and good quality access to a tourism destination. One of Newfoundland’s strengths as a tourism destination is also one of its greatest weaknesses, its geographical isolation. It is a purpose destination as opposed to a travel through destination or one located near a major centre. Cost, limited access and length of time to travel to Newfoundland have been ongoing barriers to the development of tourism. This, in turn affects places such as Twillingate Islands. The transportation challenge for Newfoundland is mirrored on the Islands.
Marine access to Newfoundland is by ferry through North Sydney, Nova Scotia. The ferries travel two routes: from North Sydney to Argentia (summer only) and from North Sydney to Port Aux Basques (year round). The ferry service accommodates both passengers and vehicles; reservations are required. The Port aux Basques ferry takes approximately six hours and connects with trans-island bus service operated by DRL Coach Lines. The Argentia ferry takes between 12-14 hours. Argentia is approximately 45 km from the Trans-Canada Highway and approximately 130 km from St. John’s.

DRL Coach Lines provides bus service between St. John’s and Port aux Basques. Acadian Lines provides service throughout the Maritime Provinces. Newhook’s Transportation Ltd. provides service between St. John’s and Argentia. No train service exists in Newfoundland, but buses can connect with VIA Rail Canada at Truro, Nova Scotia.

Tourists can also travel via airplane to Newfoundland airports in St. John’s, Deer Lake, Stephenville or Gander. Air Canada and CanJet operate direct air service to Newfoundland and Labrador from Halifax and Toronto. Provincial Airlines operates within the province and also flies from Halifax to Deer Lake and St. John’s. Air Labrador provides service within Newfoundland and Labrador. WestJet has recently announced that they will be flying to St. John’s and Gander from Moncton starting in June. Plane schedules vary between winter and summer for all airlines.

Twillingate Islands are located approximately 620 km east of Port aux Basques and 440 km west of St. John’s. The Islands can be reached by car/bus from the west by turning off the TransCanada Highway at Route 340 at Notre Dame Junction. The Islands can be reached by car/bus from the east by turning off the TransCanada Highway at Gander onto Route 330 North and then taking Route 331 North at Gander Bay to Route 340 at Boyd’s Cove. By plane one can reach Twillingate through Gander, which is 100 km from the Islands. By sea, one can take a ferry to Argentia and then drive approximately four and one half hours to the Islands or take a ferry to Port aux Basques and drive approximately six hours to the Islands. Local bus service is available daily between Twillingate, Gander and St. John’s. It takes approximately 1½ hours to drive from Gander to Twillingate and approximately 1¼ hours to drive from Grand Falls to Twillingate.

### Table B6 - Distances From Major Centres to Twillingate

<table>
<thead>
<tr>
<th>Town/City</th>
<th>Kilometres</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lewisporte</td>
<td>81</td>
</tr>
<tr>
<td>Trinity, T Bay</td>
<td>300</td>
</tr>
<tr>
<td>Grand-Falls Windsor</td>
<td>142</td>
</tr>
<tr>
<td>Corner Brook</td>
<td>401</td>
</tr>
<tr>
<td>Port aux Basques</td>
<td>619</td>
</tr>
<tr>
<td>St. Anthony</td>
<td>794</td>
</tr>
<tr>
<td>Rocky Harbour</td>
<td>423</td>
</tr>
<tr>
<td>Gander</td>
<td>102</td>
</tr>
<tr>
<td>Glovertown</td>
<td>166</td>
</tr>
<tr>
<td>Argentia</td>
<td>400</td>
</tr>
<tr>
<td>Grand Bank</td>
<td>469</td>
</tr>
<tr>
<td>St. John’s</td>
<td>440</td>
</tr>
<tr>
<td>Clarenville</td>
<td>251</td>
</tr>
</tbody>
</table>
The trunk roads between Gander and Twillingate and Notre Dame Junction and Twillingate are in poor condition. The Department of Works, Services and Transportation have said that Route 330 as far as Gander Bay and Route 340 between Fairbanks and Twillingate are listed as a priority for capital upgrades over the next five to eight years, depending on the availability of capital funds. Route 331 is a slightly lower priority as it is not a trunk line.

The municipality of Twillingate operated as a regional service centre until 1973 when a causeway was built connecting the Islands to New World Island and the mainland. Located in Notre Dame Bay area, the North and South Islands are connected by the Shoal Tickle Bridge, which was first constructed in 1884. The most recent bridge connecting the two islands was constructed in 1979.

Marine access to Twillingate Islands directly is through Notre Dame Bay. As noted previously, Twillingate Islands with its numerous sheltered coves, inlets and harbours was well situated to become an important stopover point for Newfoundland fishermen travelling to the Labrador fishery as well as being centrally located within Notre Dame Bay so as to act as a service centre. Today, Jenkins Cove adjacent to Twillingate Harbour serves as a marine service centre with a slipway and haul out facility. Each summer pleasure craft tie up in Twillingate Harbour. During 2000 and 2002, the local Harbour Authority undertook major renovations and repairs to the harbour for commercial usage including upgrading of the breakwater and wharfage as well as paving of the parking area. To date, no harbour improvements have been done to service pleasure craft.
APPENDIX C

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