

Federation of Newfoundland Indians

Tourism Strategy, Phase I
Scoping Project

FINAL REPORT

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1.0 EXECUTIVE SUMMARY

1.1 Analysis

Though the analysis of the primary and secondary research performed during the initial stage of the project, conclusions have been formed with regard to the current status of the Newfoundland and Labrador tourism industry, FNI member interest in tourism, current skills and skills required by members to participate in the tourism industry, and opportunities that fit within the parameters of the findings. The following are key highlights of the analysis performed.

Tourism Industry

Aboriginal Opportunities

- Existing Demand for Outdoor and Cultural/Heritage Tourism
- Existing Demand for Aboriginal Tourism
- Existing Demand for Aboriginal Cultural Products
- Existing support for new entrants to the Aboriginal Tourism Market, such as Aboriginal Business Canada's Tourism Business Loan.

Newfoundland and Labrador Product Opportunities

First Level Priority

- Regional/provincial packages/tours/getaways
- Key natural attractions
Gros Morne National Park
- Major theatre, cultural, entertainment events
- Learning programs and packages
- Provincial parks
- Snowmobiling (higher priority for Western and Central)
- Skiing at Marble Mountain
- Lighthouses

Second Level Priority

- Professional theatre and cultural entertainment
- Pre and post meetings/convention packages
- Major events, sports
- Community based cultural programs
- Heritage attractions
- Major events
- Resorts, lodges, inns, lighthouses (character accommodations)
- Destination hiking trails
- Outdoor adventure activities and outfitters

Third Level Priority

- Golf
- Special interest, archaeology
- Expedition and coastal cruising
- Other winter activities
- Local sightseeing tours/cruises
- Special interest natural heritage products (geology, sub arctic flora and fauna)
- ATV trails

Newfoundland and Labrador Accommodations Opportunities

Central

- Exploits Region - Insufficient demand for additional transient/service style accommodations. Opportunities for new capacity in demand influencing style accommodations.

Western

- Humber Region - No evident shortage, but suggested need for upgrading hotel accommodations in Corner Brook, adding a four star, demand influencing style property in Corner Brook, and adding additional capacity in Corner Brook to accommodate larger conventions
- Long Range Region - No evidence of greater demand over supply, although market demand and awareness is growing

FNI Band Interest

Opportunities of interest identified by the FNI Bands overlap falling into several themes and product categories. These were mostly in the areas of cultural and outdoor adventure tourism. Ideas which recurred in more than one Band are as follows.

- | | |
|---------------------------------------|---|
| • Accommodations | • Hunting and Fishing |
| • Agri-tourism/Agrifoods | • Bird Watching |
| • Boat Tours | • Eco-Tourism |
| • Crafts | • Parks and Playgrounds |
| • Cultural Events: Pow-Wows, Rituals | • Serviced RV Sites |
| • Hiking/Walking Trail Development | • Winter Adventure: ice fishing, skidooing, skiing, snowshoeing |
| • History: Historic Sites and Figures | |

Skills

Industry Requirements

Key skills required by the participants in the tourism industry to meet market demands and for industry growth include:

- Cultural/Historical Knowledge
- Technical Expertise
- Customer Service
- Leadership
- Management
- Sales/Marketing
- Business/Entrepreneurship

Industry has indicated that the best approach to developing and/or improving the required skills is via on-the-job training and continued education through relevant workshops and seminars delivered by industry authorities such as Hospitality Newfoundland and Labrador, GMIST, and the Adventure Tourism Association of Newfoundland and Labrador.

Current Membership Skills

Skill levels identified during the consultation process mainly involved trades and labour, with limited professional skills and post secondary education identified. Strong skills were mainly in the areas of crafts, woodworking and cultural interpretation, while weak skills were generally customer service, business and marketing skills.

Based upon the analysis recommendations have been put forth regarding potential tourism initiatives and methods of skills development.

1.2 Recommendations & Conclusion

The tourism initiatives have been recommended for each of the four regions encompassing the nine FNI Band Councils. The initiatives were analyzed through cross-referencing industry opinions and research and the interests indicated by participants of the band consultations. It is noted that the theme of offering authentic aboriginal experience appeared throughout all bands. The recommendations have been presented in reference to the regions and in consideration of the individual bands where possible. Following the regional recommendations the perceived top five opportunities for the Bands and individuals have been put forth. Recommendations have also been listed in the order of perceived priority. The following highlights the recommendations formed.

Gander Bay/Glenwood (Kittiwake Coast)

1. Authentic Aboriginal Experience on the Gander River
2. Snowmobile Tours
3. Culture Entertainment and Historical Attractions
4. Other Winter Experiences

Sple'tk First Nations (Grand Falls-Windsor, Exploits Valley)

1. Wig-Wam Point Initiative
2. Authentic Aboriginal Experiences
3. Exploits River Development
4. Snowmobile Touring/Trails
5. Other Opportunities
 - Culture Entertainment and Historical Attractions
 - Other Winter Experiences

Corner Brook Band & Benoit's Cove Band (Bay of Islands)

1. Authentic Aboriginal Park
2. Adventure Tours
3. Accommodation
4. Captain James Cook Historical Attraction
5. Pinch Gut Lake

Flat Bay Band, Indian Head 1st Nations, Port au Port Band & St. George's Band (Stephenville/Port au Port Peninsula Long Range)

1. Aboriginal Showcase
2. Bird watching and Eco-tourism Tours (Stephenville Crossing/Sandy Point)
3. Historic Courthouse
4. Development of the Lewis Hills
5. Culture Entertainment and Historical Attractions
6. Other Opportunities
 - Crafts
 - Archaeological Site

The top five perceived opportunities for the Bands and individual members include:

Band Initiatives

1. Sple'tk First Nations Wig Wam Point
2. Aboriginal Showcase (Bay St. George Region Band cooperative effort)
3. Captain James Cook Historical Attraction (Bay of Island region Band cooperative effort)
4. Sandy Point Interpretation Centre Development
5. Lewis Hill Interpretation Development

It is noted that the St. Georges Band Council has begun the development the St. Georges Historic Courthouse and continued work on this initiative is recommended.

Individual Initiatives

1. Gander River Aboriginal Themed Tours
2. Red Indian Lake Aboriginal Living Village and Accommodation
3. Bird Watching and Eco-tourism Tours (Stephenville Crossing/Sandy Point)
4. Authentic Aboriginal Park and R.V. Sites (Bay of Islands area)
5. Adventure Tours (Bay of Islands region)

To complement the recommended tourism initiatives, recommendations as to the skills needed, methods of acquiring these skills and the delivery of business mentoring have been put forth. The recommendations were formed on the basis of the current skills expressed by participants of the band consultations and research and consultations with industry to identify the needs of the tourism sector. The following is a summary of the recommendations made.

- The key skills required by the industry, which are directly related to the tourism initiatives to be pursued and lay outside the current skills of individuals, should be obtained either prior to or concurrent to the initiation of the venture.
- It is recommended that members of the FNI who wish to pursue a tourism initiative primarily seek out training through on-the-job training and/or continuing education. Recommended training programs are listed in the chart below.

Institution	Program
College of the North Atlantic	
1	Tour Guide Operator Training
2	Continuing educations regarding business management, marketing, customer service etc.
Hospitality Newfoundland & Labrador	
1	SuperHost Atlantic
2	E-Merit Program
3	It's Good Business - Be Responsible
4	Food & Beverage Server
5	Mature Consumer
6	Superhost: Sales Powered by Service
GMIST	
1	Canadian Avalanche Association Recreational Avalanche Course
2	Edge of the Wedge: Innovation in Experiential Learning
3	Greening Your Business – Level 1
4	Legal Liability & Risk Management for Tourism, Hospitality & Adventure Tourism
5	Snowmobile Safety, Ethics and Winter Interpretation
6	Sustainable Tourism: Good for Business & Community
Museum Association of Newfoundland & Labrador	
1	Various programs for members concerning museum/historical initiatives
Adventure Tourism Association of NL	
1	Various programs for members concerning marketing, and adventure product development
Memorial University of Newfoundland	
1	Continuing educations regarding business management, marketing, customer service etc.

- In pursuit of skills development it is recommended that members utilize the current Individual Training (Skills Development) program delivered by the FNI. Likewise, through the Job Creation Program and the Wage Subsidy Program individuals interested in obtaining on-the-job training can work in partnership with existing tourism operators, providing benefits to both parties.
- In addition to the existing programs it is recommended that the FNI approach the noted program delivering institutions to develop several workshops to provide those interested with direction. Suggested workshop topics include, but are not limited to:
 - Aboriginal Tourism Markets & Concepts
 - Tourism Marketing
 - Tourism Business Management
 - Historical/Living Interpretation

Once training is obtained in the respective areas individuals and/or interested Bands need to develop a business plan which demonstrates the viability of the venture and address key concerns to funding agencies. Recommended avenues for business planning assistance include:

- Financial assistance
 - FNI: Self–Employment Assistance Program
 - Aboriginal Business Canada (ABC)
 - ACOA Client Advisory Services
 - ACOA Women in Business Initiative – Newfoundland & Labrador Organization of Women Entrepreneurs (NLOWE)

- Guidance and Advice
 - Department of Innovation, Trade and Rural Development Economic Development Officers
 - Community Business Development Corporations

It is also recommended that the FNI examine the possibility of incorporating qualified Business Development Officers and develop a list of pre-approved consultants with varying expertise from which to refer clients to.

In conclusion, each of the nine FNI Band councils has numerous opportunities for tourism development within their respective regions. In many cases the ideas presented match market demand and the direction in which the industry wishes to develop Newfoundland and Labrador tourism. To capitalize upon these opportunities individuals and bands need to ensure that they have the necessary skills and if not seek assistance in acquiring those skills needed prior to and/or concurrent with initiating projects. Likewise, the development of a strong business plan is essential to precede and gain support for the planned initiative. Key observations that have been made include:

- The importance of bands and/or individual band members to form partnerships to initiate larger regional projects.
- The importance in creating authentic experiences for targeted markets.
- The importance of developing packaged experiences to provide tourists with complete experiences, which distribute the economic benefits to the region as well as prolong tourist stays.

2.0 TOURISM INDUSTRY ANALYSIS

The following sections provide a concise description of several strengths, weaknesses, opportunities and threats in the tourism industry, specifically with regards to Aboriginal and Newfoundland and Labrador Tourism. These have been collected through the analysis of consultations with key industry members and publications.

2.1 Aboriginal Tourism Analysis

Below are a selection of key strengths, weaknesses, opportunities and threats identified for the Aboriginal Tourism industry. A full chart of specific strengths, weaknesses, opportunities and threats, as identified by Bearing Point LP's Aboriginal Tourism Study can be found in Appendix A.

STRENGTHS

- Strong cultural appeals with music, dance, storytelling, ceremonies and celebrations, traditional foods, regalia, language and history.
- Strong natural appeal in the nature based activities and kinship with the land.
- Knowledge and front line skills of Aboriginal people are often in the areas of outdoor, nature-based activities, which are popular in tourism markets.

WEAKNESSES

- Over half of Aboriginal business respondents in a survey by DKA Marketing perceive that they have no access to capital, with no financial institutions in the communities and lack of collateral and personal resources.
- Lack of awareness of Aboriginal tourism as an independent sector. It is currently a very small component of cultural tourism, although growing.
- Lack of relevant information, education and training in tourism industry programs, services and trends among Aboriginal people.
- Limited understanding of tourism markets and marketing activities.
- Limited awareness of funding sources and processes.
- Lack of collaboration with other groups.

OPPORTUNITIES

- Existing Demand for Outdoor and Cultural/Heritage Tourism
 - Sixty percent of all pleasure travellers in Canada interact directly with the outdoors, either as campers, park visitors, anglers, hunters, boaters, hikers or skiers. (Research Resolutions & Consulting Ltd.)
 - Twenty-three percent of Canada's overnight pleasure visitors go to fairs or festivals, heritage sites, museums or galleries and or cultural events, including Aboriginal cultural events. (Research Resolutions & Consulting Ltd.)
 - Eighty-one percent of travellers desire a cultural, arts, historic or heritage activity while travelling. (Economic Planning Group of Canada, *A Special Place, A Special People*)
 - Thirty-two percent of historic/cultural travellers add extra time to their trip because of a cultural, arts or heritage attraction. (Economic Planning Group of Canada, *A Special Place, A Special People*)

- Sixty-one percent of US travellers believe that their experience is better when the destination preserves its natural, historic and cultural sites, with 41% saying their vacation experience is better when they can see and do something authentic. (Economic Planning Group of Canada, *A Special Place, A Special People*)
- The Heritage Tourism Enthusiasts market is estimated at 2.2 million Canadians and 8.3 million Americans. Atlantic Canada has the highest attraction rate among this group at 3.5. (Canadian Tourism Commission)
- Canadian and American Soft Outdoor Adventure Tourism Enthusiasts are estimated at 4.4 million and 7.1 million adults respectively. (Canadian Tourism Commission)
- Existing Demand for Aboriginal Tourism
 - Aboriginal tourism generated \$250 million a year in 1999 and is expected to reach the \$1 billion mark in 10 years if all potential is realized. (Aboriginal Tourism Team Canada and the Canadian Tourism Human Resource Council)
 - Americans who participate or intend to participate in Aboriginal cultural and outdoor experiences on trips represents 12% of the total US adult participation, or 24 million. (Research Resolutions & Consulting Ltd.)
 - An estimated 1.2 million Canadians have participated in Aboriginal culture and outdoor activities while on trips in Canada. (Research Resolutions & Consulting Ltd.)
 - Approximately 522,000 Canadian overnight travellers claim to have attended an Aboriginal or native cultural event on their trip, with 52% of these trips taking place between July and September. (Research Resolutions & Consulting Ltd.)
 - European markets have been consistently noted as having a strong demand for Aboriginal cultural tourism.
- Existing Demand for Aboriginal Cultural Products
 - Aboriginal arts and crafts are receiving increasing global interest. It is estimated that 12% of all Canadian Aboriginal exports are arts and crafts products, distributed mainly to the US and Western Europe. (DKA Marketing)
- Existing support for new entrants to the Aboriginal Tourism Market, such as Aboriginal Business Canada's Tourism Business Loan.

THREATS

A large threat against the development of Aboriginal Tourism is likely the internal weaknesses which constrain further development of the opportunities here presented. These weaknesses must be overcome in order for threats and limitations to be minimized. Other threats include:

- Lack of concrete government support
- Long processing time for funding applications
- Infrastructure limitations in Aboriginal communities
- Land issues, unsettled claims
- Industry immaturity

Again, please refer to Appendix A for a detailed chart of Aboriginal Tourism strengths, weaknesses, opportunities and threats as identified by Bearing Point LP.

2.2 Newfoundland and Labrador Tourism Analysis

The Newfoundland and Labrador tourism industry is experiencing significant growth and is in a strong position in the larger Canadian tourism industry. The provincial tourism industry accounts for approximately 2% of the provincial GDP, with tourism spending estimated at \$800 million annually. (*The Economy 2005*) The following is an analysis of the current Newfoundland and Labrador tourism industry situation. Many of the strengths, weaknesses, opportunities and threats identified here were uncovered in research conducted by the Economic Planning Group of Canada in their report *A Special Place, A Special People*, as well as consultations with key tourism industry stakeholders.

STRENGTHS

- Strong resident market base
 - Newfoundland and Labrador residents take some 3 million trips in their own province. (Economic Planning Group of Canada)
 - Sixty-three percent of total tourism spending comes from resident tourists. (*The Economy 2005*)
- Strong non-resident market
 - The number of non-resident visitors to the province increased 5.9% in 2004 to 449,300. (Department of Tourism, Culture and Recreation - DTCR)
 - Non-resident tourist expenditures increased 10% in 2004 to \$330 million. (DTCR)
 - Air passenger travel increased 13.2% while cruise ship visitors increased 25.5% and port calls nearly doubling. (DTCR)
 - 204 busses exited the province between May and October 2004, an increase of 6%.
- Cultural appeals
 - Early contact cultures of Beothuk and Dorset and living Aboriginal cultures, such as Innu, Inuit, Métis and Mi'kmaq.
 - Internationally recognized sites such as L'Anse aux Meadows, a UNESCO World Heritage Site.
 - Numerous historic attractions: 10 Provincial Historic Sites, 10 National Historic Sites, 4 Provincial Museums and major archaeological digs.
 - Unique communities: living heritage of coastal outport communities and vibrant urban centres.
 - Unique theatre, music and entertainment appeals, numerous festivals and events.
 - Unique traditional food appeals.
 - Unique people: friendly, courteous, humorous and fun.
- Natural appeals
 - Natural icons: whales, icebergs, coastal scenery, forests, bodies of water, birds, moose, caribou.
 - Parks and natural areas: 16 Ecological Reserves, 2 Wilderness Reserves and 31 Provincial Parks, 2 National Parks, 6 natural attractions/day use parks
 - Wildlife population for fishing and hunting.
 - Winter activities possible such as skiing, snowmobiling.
- Appeal of Atlantic Canada, and Newfoundland and Labrador, being recognized in national and international markets, especially regarding cultural/outdoor tourism.
 - Of the 69% of Canadians who planned to take a summer trip in 2005, 66% planned to remain in Canada, with Newfoundland and Labrador leading the

- other Atlantic Provinces in terms of preference as a destination. (Conference Board of Canada, reported by Department of Tourism, Culture and Recreation)
- Atlantic Canada has great appeal to cultural/outdoor (“dual track”) tourists, with 14% of dual trackers visiting this area, as compared to a lesser 12% of general tourists. (Research Resolutions & Consulting Ltd.)
- Western and Central Regions among top destination choices.
 - The Western Region experiences the highest number of party nights at 37.8%, followed by the Avalon (28.4%) and Central Regions (23.0%). (1997 Auto Exit Survey)
- Strong craft industry
 - The estimated sales value of the provincial craft industry is between \$10 and \$12 million annually, with sales increasing approximately 8% annually up to 2002. (AMEC Earth and Environmental Limited and Hollett and Sons)

WEAKNESSES

Industry Operators Concerns:

- Experiences are highly seasonal, mainly from June to September, with a limited number of attractions available in the spring, fall and winter months.
- Level of professionalism and quality of customer service is a perceived industry concern.
- Noted repetition of products and services. Need to diversify offerings so that visitors can have varied experiences.
- Lack of packaging, to provide longer, value-added and higher yield experiences.
- Quality of interpretive programs inconsistent and limited.

Consumer Concerns:

- Transportation services
 - Ferry is noted as being dirty, expensive, long, and difficult to make reservations.
 - Expense of flying.
 - Difficulty in finding rental cars.
 - Highway and directional signage confusing and inadequate.
 - Motorcoach equipment offered by local coach operators is old, in a poor state of repair and expensive.
- Shortage of rest stops and/or gas stations along the Trans Canada Highway.
- Lack of variety of menu choices and lack of awareness about restaurants and where to eat.
- Misperceptions, especially from the rest of Canada, that Newfoundland and Labrador is an isolated province of poverty with very little to see or do.
- Early closure of attractions and services in September.

OPPORTUNITIES

Below are a select number of general opportunities identified for Newfoundland and Labrador tourism. These opportunities are further defined by region, product development and accommodations needs, with a specific focus on the Western and Central regions.

- Growing meeting and conventions market, especially in St. John's, but increasingly needed in areas such as Gander, Corner Brook and Rocky Harbour.
- Shoulder seasons and winter products to expand the tourism season.
- Product packaging, incentive travel packages.
- Facilities to serve the growing recreational vehicle market.
- More interpretive programming needed.
- More evening entertainment to serve group tour market.
- Coastal adventure cruising and home porting of smaller cruise ships.
- Improving economic conditions.
- Government influences in the area of small business support and tourism policies.

Regional Priorities

The Economic Planning Group of Canada has prioritized regions of the province and identified several specific opportunities for these regions regarding product development and needs for accommodations. The following two tables show the priority levels assigned, and the regions to which these were assigned.

Priority Definitions

Tier 1 Established	Have critical mass and appeal. Should be given first priority for future complementary development efforts.
Tier 2 Warrants Development	Have some, but not sufficient critical mass of anchor attractions. Should receive the next level of priority for further development.
Tier 3 Potential (Latent)	Have some strong natural or cultural appeals but few attractions or services available. Should be approached as longer-term undertakings requiring more substantial effort and investment.
Corridors/Hubs	Function as service centers for travellers in strategically located areas. Focus should be on strengthening services.
Sleeper Destinations	Speculative possibility for future attention.
Themed touring routes	Have a critical mass of attractions and activities, plus one or more tier 1 or tier 2 destination communities and a decent road.

Regional Priorities

Area	Zone	Tier
Corner Brook/Marble Mountain/Humber Valley	8	2
Stephenville and Port au Port Peninsula	9	3
Codroy Valley/Southwest Coast	10	3
Baie Verte Peninsula	11	3
Bay of Exploits/Exploits Valley	12	3
Change/Fogo Islands	14	3
Corner Brook	8	Hub
Deer Lake	8	Hub
Stephenville	9	Hub
Port aux Basques	10	Hub
Grand Falls/Windsor	12	Hub
Gander	14	Hub
Burgeo	9	Sleeper

Kittiwake Coast (Road to the Shore)	Potential Themed Touring Route
Dorset Trail	Potential Themed Touring Route

Source: Economic Planning Group of Canada. *A Special Place, A Special People*

Product Opportunities

Product opportunities are identified in the matrix below, evaluated on the basis of their ability to influence demand and build upon shoulder and winter seasons. *A Special Place, A Special People* also identifies specific projects to be considered for the Central and Western Regions, examined below.

Provincial Product Development Priorities

Demand Influencing	Potential for Shoulder/Winter Demand		
	Primary	Secondary	Limited
First Level Priority	<ul style="list-style-type: none"> Regional/provincial packages/tours/getaways Key natural attractions Gros Morne National Park 		
Second Level Priority	<ul style="list-style-type: none"> Professional theatre and cultural entertainment Pre and post meetings/convention packages Major events, sports 	<ul style="list-style-type: none"> Community based cultural programs Heritage attractions Major events Resorts, lodges, inns, lighthouses (character accommodations) Destination hiking trails Outdoor adventure activities and outfitters Major theatre, cultural, entertainment events Learning programs and packages Provincial parks Terra Nova National Park Special interests, birds 	<ul style="list-style-type: none"> Snowmobiling (higher priority for Western and Central) Skiing at Marble Mtn Lighthouses
Third Level Priority		<ul style="list-style-type: none"> Golf Special interest, archaeology Expedition and coastal cruising 	<ul style="list-style-type: none"> St. Pierre partnership projects Other winter activities Local sightseeing tours/cruises Special interest natural heritage products (geology, sub arctic flora and fauna) ATV trails

Source: Economic Planning Group of Canada. *A Special Place, A Special People*

Product Development Opportunities, Central Region

Bay of Exploits/Exploits Valley	<ul style="list-style-type: none"> • Flying Boat Re-enactment and heritage facility at Norris Arm • Snowmobiling link to Deer Lake • Signage for Salmon Interpretation Centre in Grand Falls-Windsor • Implementation of key projects from the Exploits Coastal Trail Tourism initiative • Beothuk/Aboriginal themed experiences
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Source: Economic Planning Group of Canada. *A Special Place, A Special People*

Product Development Opportunities, Western Region

Corner Brook/Marble Mountain/Humber Valley	<ul style="list-style-type: none"> • Four season destination development • Skiing, snowmobiling, kayaking, hiking, river rafting, ATV touring, boating, fall colour • Upgrading of water falls other attractions at Sir Richard Squires Park
Stephenville and Port au Port	<ul style="list-style-type: none"> • Expansion of Stephenville Theatre Festival programming into the Port au Port Peninsula • French/Acadian interpretive centre with themed restaurant

Source: Economic Planning Group of Canada. *A Special Place, A Special People*

Other opportunities identified by the Regional Economic Development Boards in Central and Western Newfoundland are as follows.

Western

- Sports Tourism
- Cruiseship/tall ship market potential
- Eco-tourism
- Cultural and Heritage Attractions
- Adventure Tours
- Winter Activities, Snowmobiling
- Professional Boat Tours
- Regional Based Museums
- Marine exhibits/interpretation (whales, ice bergs)
- Aboriginal Tourism Products
 - Storytelling
 - Replica Canoes
 - Pow-Wow's

Central

- Wildlife Habitat (Marine Environment)
- Exploits River and Red Indian Lake Development
- Winter Tourism Development
- Trail Development for ATV's and Snowmobiles
- Community Hiking and Walking Trails
- Lodging and Lumber Museum (Point Leamington)
- Exploits Resource Interpretation Centre
- Geological and Mining Heritage Interpretation Centre
- Recreational Fishing Development
- Canoeing, Kayaking and Remote Camping along the Exploits River
- Recreation Boating along Red Indian Lake
- Aboriginal Tourism – Authentic experiences exhibiting connection with the Exploits River

Other noteworthy opportunities identified by the various industry authorities are as follows.

- Eco-tourism
- Adventure Tourism
- Gander River Development
- Cultural and Historical Sites
- Natural Resources – Fauna, Geology
- Exploits River Development
- Winter Tourism
- Aboriginal Tourism – Authentic cultural based development i.e. sweat lodges, crafts events
- Accommodations
- Campgrounds

Accommodations Opportunities

Accommodation priorities are identified in *A Special Place, A Special People* as those which:

1. Have demand generating potential
2. Have demand influencing potential
3. Fill gaps in the supply of the right type and quality

A demand generating accommodation is one that to a significant extent generates its own demand, can be a destination in its own right or as an important component of a longer trip. Several possibilities identified include:

- A *multi-season destination resort* having at least 50 units along with a variety of recreational and other amenities onsite, plus dining.
- A *wilderness lodge* operated as a base for outdoor adventure or for fishing or hunting.
- A *specialized, niche market property* such as a spa retreat, religious or fraternal camp, or a recreational learning centre or retreat.

A demand influencing accommodation is one that has sufficient appeal to draw people to the area and extend the stay and spending in the area. These include:

- *Smaller resorts, cottage resorts and lodges* having onsite or nearby recreational and other amenities, either housekeeping units or dining or both.
- *Character inns*, such as *country inns, heritage inns and professional bed and breakfasts*. These would exemplify the heritage architectural character of rural life or a former era, with a selection of interesting things to do and see onsite and in the area.
- *Other unique character accommodations* having comparable appeals, such as a converted lighthouse.

Properties which fill the gaps are generally what are referred to as *traveller service accommodations*, such as the hotel/motel or bed and breakfast types. These warrant support only in the case of filling a clear gap in supply, with priority being given to a demand influencing style accommodation which can also fill the gap.

Below are accommodations opportunities identified in *A Special Place, A Special People*, for selected regions.

Accommodations Opportunities, Central Region

Zone 14 Kittiwake Coast	<ul style="list-style-type: none"> • Demand influencing style property such as an inn with dining in Twillingate • Better quality properties, Eastport Peninsula • Additional accommodations, Fogo/Change Islands • Accommodations in Salvage
Zone 12 Exploits Valley	<ul style="list-style-type: none"> • Insufficient demand for additional transient/service style accommodations • Opportunities for new capacity in demand influencing style accommodations
Zone 11 Emerald	<ul style="list-style-type: none"> • Significant level of further development needed to make this area a tourist destination • Poor quality accommodations • Further development of attractions and activities to increase visitation • Limited need for additional accommodations

Source: Economic Planning Group of Canada. *A Special Place, A Special People*

Accommodations Opportunities, Western Region

Zone 8 Humber	<ul style="list-style-type: none"> • No evident shortage, but suggested need for upgrading hotel accommodations in Corner Brook, adding a four star, demand influencing style property in Corner Brook, and adding additional capacity in Corner Brook to accommodate larger conventions
Zone 9 Long Range	<ul style="list-style-type: none"> • No evidence of greater demand over supply, although market demand and awareness is growing
Zone 10 Marine and Mountain	<ul style="list-style-type: none"> • Some turn-a-ways, but demand not sufficient to justify additional transient style properties • Opportunities for unique, demand-influencing style to encourage longer stays

Source: Economic Planning Group of Canada. *A Special Place, A Special People*

THREATS

- Decreases in certain sectors, to be monitored for future trends and underlying causes.
 - Non-resident visitors arriving to the province by automobile decreased 10% in 2004, while Marine Atlantic passengers decreased 8.3% and passenger related vehicles decreased 9.2%. (DTCR)
 - Visits to Provincial Museums, Provincial Historic Sites and National Historic Sites all decreased over the 2003-2004 season, although there has generally been long term growth in these areas. (DTCR)
 - There were 56,413 registered camping units in provincial parks, a decrease of 3.3%. (DTCR)
- Dependence on natural resources means added attention must be placed on preservation, conservation and sustainability of these resources to avoid their decline.
- Economic conditions: Changes in the Newfoundland and Labrador economy or those of visiting countries can influence consumer spending habits and tourism behaviours.
- Government regulations: These can provide limitations on the types and number of activities permissible, for example allowing a set number of operator licenses for tours of ecological reserves or establishments on the Gander River.

2.3 Band Tourism Analysis

FNI Bands are involved in the tourism industry to some extent, either individually or at a band level. Involvement is generally in sectors such as outdoor adventure and performing and cultural arts. However, the knowledge level of tourism as a viable and valuable industry is limited, and there is a lack of awareness of programs, trends and positioning of the local tourism industry. There is also a lack of recognition of how closely the cultural products of the Mi'kmaq communities match the demands of tourism markets, although this awareness is growing. Below is an evaluation of the current situation of FNI Bands as it relates to tourism, and the presence of certain important factors in the Bands.

Skills/Knowledge Level	Presence in Bands		
	Low	Medium	High
Tourism Interest			X
Tourism Involvement (Individual Level)		X	
Tourism Involvement (Band Level)		X	
Tourism Awareness (Programs, Resources)	X		
Product/Market Match			X

Please refer to Appendix B for a detailed chart outlining strengths, weaknesses, opportunities and threats for the FNI Bands as identified during the consultation process.

Below, existing tourism initiatives of both the Bands and their individual members have been charted. Depending on the band, tourism involvement is generally limited. However, initiatives mostly fall into similar sectors, including: culture and heritage, outdoor activities, accommodations, services and crafts.


Existing Tourism Initiatives

Band	Band Tourism Initiatives	Member Involvement
Benoit's Cove	None identified	Coffee Shop in Lark Harbour
Corner Brook	None identified	Campground/Sweat Lodge, Cox's Cove
Flat Bay	Pow-Wow in partnership with other bands	Bed and Breakfasts Outfitting Crafts
Glenwood Mi'Kmaq 1st Nations	Glenwood Lodge	None identified
Gander Bay	Attempt to purchase lodge on Gander River	Craft/Furniture Making Convenience Store Various tour guides on Gander River
Indian Head First Nations	Aboriginal Showcase, Arts & Culture Centre, Stephenville	Guiding Tour Operators Craft Specialists
Port au Port	None identified	Tour Operators Bed and Breakfasts Craft Specialists
St. George's	Historic Courthouse Project - Mi'kmaq Cultural Heritage Museum Elders Christmas Feast Aboriginal Day Pow-Wow partnership with Flat Bay	None identified
Sple'tk First Nations	2003 Study Aboriginal Dancers Wig Wam Point	Eagle Haven Lodge Red Indian Outfitters

Below these initiatives have been highlighted as they relate to the overall provincial picture, categorized according to divisions of the Newfoundland and Labrador Travel Guide, with specific sectors identified by the Bands added. Where possible, total counts for each economic zone have been given.

Provincial and Band Initiatives by Sector

	Western					Central			
	6	7	8	9	10	11	12	13	14
Accommodations	33	64	47	20	19	15	20	5	72
Attractions, Activities, Tours									
Campgrounds	4	16	8	2	5	4	7	1	13
Festivals, Events	7	5	8	6	5	5	19	3	13
Restaurants	23	19	69	21	12	14	38	3	54
Shops, Studios & Galleries	9	24	13	4	4	3	8	5	23
Outfitting/Guiding									
Traveller Services									
Crafts									
Tour Operators									
Cultural/Heritage/Performing									

 Zones with Band Presence
  Band Tourism Activity

As with tourism involvement, the opportunities identified by the FNI Bands overlapped, falling into several themes and product categories. These were mostly in the areas of cultural and outdoor adventure tourism. Ideas which recurred in more than one Band are as follows.

- Accommodations
- Agri-tourism/Agrifoods
- Boat Tours
- Crafts
- Cultural Events: Pow-Wows, Rituals
- Hiking/Walking Trail Development
- History: Historic Sites and Figures
- Hunting and Fishing
- Bird Watching
- Eco-tourism
- Parks and Playgrounds
- Serviced RV Sites
- Winter Adventure: ice fishing, skidoing, skiing, snowshoeing

A complete listing of tourism opportunities by Band as identified during the Band Consultations and FNI Interviews, is in the SWOT Analysis of Appendix B.

3.0 SKILLS ANALYSIS

3.1 Industry Skills Analysis

Newfoundland and Labrador Labour Market

The labour market in Newfoundland and Labrador has experienced significant growth over the years, and with an aging population and several rising trends, the outlook in several sectors is positive. According to Newfoundland and Labrador Work Information Network, employment grew by 14.4% between 1996 and 2002 and the participation rate increased by 6.5 percentage points. About 80% of employment gains since 1996 have been in service industries. The labour force totaled 426,700 in 2004, with 183,000 full time and 32,200 part time workers.

The province is focusing on economic diversification activities in the manufacturing and technical, tourism and culture, and energy industries. Those working within the service sector will be prominent in tourism and culture industries and for other spin-off activities. Increased tourism activity boosted accommodation and food services employment by 26.5% over the 1996 to 2002 period.

Regionally, the following labour market statistics are available, showing an increase in the employment rate in both the Central and Western Regions.

	Unemployment Rate		Employment Rate		Labour Force
	1997	2004	1997	2004	
West Coast, Northern Peninsula & Labrador	18.5%	20%	42.2%	47.6%	53,600
Central Region, North East Coast	20.6%	19.6%	37.0%	43.6%	52,500

Overall employment in Information, Culture and Recreation peaked at 7,900 in 2004, but has dropped to 1997 levels (6,400) as of October 2005, while employment in Accommodation & Food Services has grown, from 9,700 in 1997 to 13,100 in 2005.

This data indicates that there is a significant portion of the Newfoundland and Labrador labour market with the skills required for the tourism industry. Likewise, the information indicates that with provincial policy of economic diversification and a growing labour force there is an opportunity for additional members of the labour force to acquire service skills.

Training Programs

Examining the range of hospitality, travel and tourism training programs provided in this province reveals a number of key skill sets which are important for participating in the tourism industry. Programs offered by the Academy Canada, College of the North Atlantic, CompuCollege, Corona College, Gros Morne Institute of Sustainable Tourism, Hospitality Newfoundland and Labrador, Keyin College, and Memorial University Sir Wilfred Grenfell College were examined. Depending on the type of program, the courses focus on building skills in the following areas:

-
- Accounting/Bookkeeping/ Administration
 - Business & Entrepreneurship
 - Communications
 - Computers/Word Processing
 - Customer Service
 - Leadership
 - Management
 - Sales/Marketing
 - Specific Operational Requirements (for Food/Beverage, Event Planning, Accommodations)
 - Tourist Destinations
 - World and Local Cultures

Specific programs for outdoor/winter adventure or tour operations also receive specific technical training in the recreational skills they will be demonstrating, as well as safety and first aid. Several of these programs also offer work terms to provide hands on, practical experience of the theoretical applications. Please refer to Appendix C for a table outlining the specific elements of each program, to be used as indicators of key industry skills. Programs identified in this table are noted as being the more general of those studied, with components identified from available course descriptions.

As a result of the industry consultations, key skill sets required for the tourism industry were identified as follows.

- Knowledge of Newfoundland and Labrador culture and geography
- Professionalism
- Technical/mechanical knowledge of the product/service being delivered
- Survival skills in relation to the product/service being delivered i.e. snowmobiling, hiking

Industry perceives the skill level of current tourism operators and industry employees as being adequate in these areas. It was also noted that the industry views the strongest skills exhibited by those in Central and Western Newfoundland being their friendliness to visitors and their love/enthusiasm for the outdoors. The weaknesses that are exhibited were indicated as being knowledge of the overall Newfoundland tourism market and geography, etiquette with regard to product delivery and maintenance, especially with respect to snowmobile trail grooming, and the ability to market the products and services.

Industry has indicated that the best approach to developing and/or improving the required skills is via on-the-job training and continued education through relevant workshops and seminars delivered by industry authorities such as Hospitality Newfoundland and Labrador, GMIST, and the Adventure Tourism Association of Newfoundland and Labrador.

3.2 Band Skills Analysis

Skill levels identified during the consultation process mainly involved trades and labour, with limited professional skills and post secondary education. Strong skills were mainly in the areas of crafts, woodworking and cultural interpretation, while weak skills were generally customer service, business and marketing skills. The following table outlines skills important to tourism industry development, and their presence in the FNI Band membership. The low presence of skills related to business and tourism development indicates the need for definite support in the form of training and mentoring opportunities. Although business and marketing skills are low, the tangible skills necessary to deliver a quality tourism product are high, demonstrating that with the proper training, gaps can be narrowed to ensure the delivery of quality products and services.

Skills/Knowledge Level	Presence in Bands		
	Low	Medium	High
Education Level		X	
Outdoor/Cultural Interpretation			X
Management/Business	X		
Marketing Knowledge	X		
Hands On Trades (Crafts, culinary)			X
Customer Service	X		
Entrepreneurial Interest		X	

During the consultations several training needs were identified, specifically involving FNI support and assistance for tourism training programs and business mentoring. A specific suggestion was for an Aboriginal tourism course to be offered by the College of the North Atlantic. Please refer to Appendix B for skill levels presented in the Band SWOT Analysis, and support suggestions as indicated by each Band during the consultation process.

4.0 RESOURCES ANALYSIS

4.1 Industry Resources Analysis

Funding Programs

Business Development

Programs administered by the Aboriginal Business Canada (ABC), Atlantic Canada Opportunities Agency (ACOA), Department of Innovation, Trade and Rural Development (DITRD), Indian and Northern Affairs Canada (INAC), Ulnooweg, the Canada-Newfoundland Agricultural Policy Framework, Community Business Development Corporations (CBDC) and the Business Development Bank of Canada (BDC) were examined to determine business development and expansion activities commonly funded. A list of the major eligible activities of these programs is given below, while a detailed list of the activities funding by each program is available in Appendix D.

-
- Capital Acquisitions & Equipment
 - Consultants Advice (Business/Marketing Plans)
 - Debt Financing
 - Information Technology
 - Infrastructure
 - Innovation
 - Intangible Assets
 - Marketing
 - Productivity Improvement
 - Refinancing
 - Site Improvements
 - Start up/Expansion
 - Training
 - Working Capital

These programs are beneficial because of the broad range of requirements supported; however, there are limits to the types of businesses, sectors, and activities funded by some of the organizations. Through industry consultations, restrictions were indicated for funding by some of the agencies with regard to bar/lounge establishments, retail, and professional services. It is also noted that some of the organizations focus their funding on specific industries, with tourism noted as an industry that is currently being supported. Emphasis is typically placed on industries which have been identified in the strategic plan of the organization and those inline with the provincial and regional economic growth indicators.

Of special note is Aboriginal Business Canada's Tourism Business Loan, which provides funding for tourism businesses in the following areas:

- Destinations and Attractions: wildlife viewing, canoeing and heli-skiing. (Short-term events such as festivals and Pow-Wows are not eligible for ABC support, since they are not ongoing commercial ventures.)
- Accommodations: hunting and fishing lodges, campgrounds, motels, hotels and resorts.
- Transportation: tour buses, water taxis servicing tourism destinations, ferries and ground taxis, provided the applicant can demonstrate that a significant portion of annual revenues would come from tourists.
- Food and Beverage: restaurants providing food services ancillary to a specific tourism destination.
- Retail: gift shops or other retail operations related to a specific tourist destination.
- Tourism: tour operators, outfitters, guides, interpreters and travel agencies.

Applicants to this program must follow the application process as outlined on Aboriginal Business Canada's web site. As an applicant moves through the process of approval ABC may assist them with the cost of developing a business plan and subsequently upon the approval of project assist with the business start-up.

Also of note is the Department of Innovation, Trade and Rural Development's Craft Industry Development Program, which provides assistance to craft, gift and apparel producers, retailers and economic development/non-profit organizations. Under various components, this program offers producers 50% to 75% of costs for training, marketing, and research and development activities, up to stated maximums. DITRD also operates the Crafts of Character program, which promotes the craft, gift and apparel sector through the Crafts of Character brand, web site, trade show and various print materials. More information is available at www.craftsofcharacter.com.

In addition to the business development programs offered, INAC also delivers the Community Economic Development Program (CEDP) and the Community Economic Opportunities Program (CEOP), which provide funding to First Nation and Inuit communities and organizations for public services in economic development, which can assist Councils to develop the infrastructure and support systems necessary for further economic development, such as:

- Community economic planning and capacity development
- Proposal development and leveraging of financial resources
- Community economic development activities such as:
 - Employment of community members
 - Community-owned and community-member business development
 - Community land and resource development
 - Access to opportunities from land and resources beyond community control
 - Investment promotion in the community
 - Research and advocacy

This could be an excellent resource for Band led initiatives, but is available only to First Nations groups and is not accessible by all members of the FNI at this point in time.

Funding programs typically require a personal contribution of equity on behalf of the proponent, of a percentage of the total loan, which may limit a proponent's ability to make use of the programs. Likewise, a strong business plan that exhibits a viable venture, economic benefits, the applicants experience and education is required when applying. In addition, research shows that although there are numerous business development programs available, only one in five businesses surveyed by Aboriginal Business Canada had received financial support from governments or Aboriginal organizations. The most frequently used sources of financing were personal savings, retained earnings and loans or lines of credit from financial institutions. (Aboriginal Business Canada)

Human Resources

Programs offered by the provincial Department of Human Resources, Labour and Employment, and the federal Department of Human Resources Skills Development Canada and those currently offered through the Aboriginal Human Resources Development Agreement delivered by the Federation of Newfoundland Indians were examined. Noted programs include:

FNI & HRSDC

- Disability Program
- Grad Incentive Program
- Individual Training (skills development)
- Job Creation Programs
- Self Employment Assistance Program
- Seasonal Employment (*Offered by FNI only*)
- Seasonal Wage Subsidy Programs (*Offered by FNI only*)
- Student Career Placement (*Offered by HRSDC only*)
- Wage Subsidy Program

HRLE

- Labour Market Agreement for Persons with Disabilities
- Wage Subsidy Programs
- Graduate Employment Program
- Linkages
- NL Works – Seasonal and Long Term Components
- Student Work and Services Program (SWASP)

Many of these programs offer wage contributions for certain eligible applicants. These are beneficial as they provide necessary relief to small businesses to acquire extra personnel capabilities. However, eligibility criteria are often very specific, regarding terms of EI eligibility and the types of people to be hired. Many of these programs are job creation and work experience programs, to give individuals with barriers to employment experience and exposure to job skills. This may mean some difficulty in finding a candidate with the right skill sets, or who will not require much guidance. Some are also temporary funding programs which cannot be used to fill the same position more than once. This requires a strong financial position of the employer to continue to have this person on staff at the end the program. However, those which provide funding for seasonal work, such as NL Works, and those which are directed at summer employment for students are excellent resources for employment during the peak seasons of the tourism industry.

It is also noted that these programs can also be used by eligible FNI members to obtain valuable work experience in the tourism industry prior to embarking on the business venture.

Infrastructure & Support Services

The infrastructure and support services throughout Newfoundland and Labrador encompass transportation networks, utility, media, and communications companies. Likewise, there is a network of supporting associations throughout various industry sectors, as well as government departments and agencies devoted to the development of current and growing industries. The numerous industry associations and economic development agencies are a key strength for the provincial economy. Noteworthy associations that can assist existing and new tourism business within Western and Central Newfoundland include but are not limited to:

- Adventure Tourism Association of Newfoundland and Labrador
- Area Chambers of Commerce
- Association of Cultural Industries
- Association of Heritage Industries
- Central Newfoundland Tourism Association
- Craft Council of Newfoundland and Labrador
- Emerald Zone Corporation
- Exploits Valley Economic Development Corporation
- Exploits Valley Tourism Association
- Festival Coast Tourism Association
- Hospitality Newfoundland and Labrador
- Humber Economic Development Board Inc.
- Kittiwake Economic Development Corporation
- Long Range Regional Economic Development Board
- Marine & Mountain Zone Corporation
- Newfoundland and Labrador Outfitters Association
- Museum Association of Newfoundland and Labrador
- Newfoundland and Labrador Snowmobile Federation

Although the infrastructure and the support systems are well established throughout the province, a gap in some of the services provided has been noted. These include:

- Transportation: Roads in poor condition, access to remote regions limited.
- No Aboriginal Regional Tourism Association like other Canadian provinces, although it is noted that Aboriginal tourism in Newfoundland is relatively young.
- Limited access to communication technology in rural area of the province.
- Limited access to industry representatives and business resources in rural areas of the province.

The current economic status of the paper industry in Stephenville has also been noted as an influential factor with regard to the development of the tourism industry in the area. With this industry providing a significant employment to area and its current state of transition, the government may be open to providing greater support to the developing tourism industry. Likewise, should the changes in paper industry result in a decline in jobs for the region and significant out migration then regional support services may diminish due to lower population levels.

4.2 Band Resources Analysis

During the consultation process, a number of strengths and weaknesses of the Bands were revealed, regarding their access to resources such as funding, assets and labour, which will be important in business development, in tourism specifically. The following table outlines the presence of these resources in the Bands. Although there are programs designed for Aboriginal entrepreneurship, many members feel that access to capital funding was limited, noting that personal finances required to make up the equity portion limited these opportunities. Another constraining factor regarding resources available was the level of understanding of the funding process, which further limits how membership can make use of available resources. On a positive note, bands are generally of a significant size, although skills are limited, as discussed above, making a strong pool of labour to build upon. Also, some bands possess land and assets which can be put to use for Band business initiatives.

Resources	Presence in Bands		
	Low	Medium	High
Personal Financial (Income)	X		
Access to Capital Funding		X	
Understanding of Business Development Processes	X		
Land/Assets		X	
Labour Size			X

5.0 ANALYSIS SUMMARY

5.1 Tourism Opportunities

Analysis of the data presented in the industry primary and secondary research has identified numerous opportunities for growth in the tourism industry. It has been revealed that tourism is an emerging industry in Newfoundland and Labrador and that government, industry associations and funding agencies are supporting its growth through the development of strategic plans. Likewise, the open consultations with the nine Bands and members of the Federation of Newfoundland Indians staff have revealed an interest in tourism development.

Through cross-referencing the opportunities indicated by industry and those revealed by the FNI members as key interest areas, numerous matches for development have been revealed. Please refer to the table in Appendix E which highlights the matched opportunities for each region. The following points summarize the information found in the table.

Central – Kittiwake (Gander & Glenwood)

- Adventure Tourism Activities
 - Canoeing – Specifically on the Gander River
 - Rafting - Specifically on the Gander River
 - Seadooring - Specifically on the Gander River
 - Boat Tours - Specifically on the Gander River
 - Hunting & Fishing
- Winter Tourism Activities
 - Ice fishing - Specifically on the Gander River
 - Skidooring
 - Cross Country skiing
- Aboriginal Tourism
 - Crafts
 - Authentic Cultural Experiences

Central – Exploits (Sple'tk)

- Adventure/Soft Tourism Activities
 - Canoeing – Specifically the Exploits River
 - Kayaking - Specifically the Exploits River
 - Fishing – Specifically the Exploits River
 - Guiding – Specifically the Exploits River
- Marine Eco-tourism
- Lodging on the Exploits River
- Winter Tourism Activities
 - Snowshoeing
- Aboriginal Tourism
 - Crafts
 - Authentic Cultural Experiences
 - Interpretation Centre
 - Adventure Tours – Snowshoeing

Western – Humber (Benoit’s Cove & Corner Brook)

- Adventure/Soft Tourism Activities
 - Hiking Trail Development
 - Boat Tours
 - Hunting & Fishing
- Cultural/Historical Tourism Activities
 - Captain James Cook Attractions
- Winter Tourism Activities
- Aboriginal Tourism
 - Crafts
 - Authentic Aboriginal Themed Park

Western – Long Range (Flat Bay, Indian Head, Port au Port, St. George’s)

- Adventure/Soft Tourism Activities
 - Hiking Trail Development
 - Fishing – Salmon Rivers
 - Bird Watching
- Cultural/Historical Tourism Sites
 - Sandy Point Site Development
 - Monument at Hungry Grove
 - Devil’s Place
 - Molly Ann’s Cove
 - Dolly’s Lookout
 - Calvery Hill
 - Black Bank Beach
- Winter Tourism Activities
 - Skidooing – Lewis Hills
- Eco-tourism
- Aboriginal Tourism
 - Crafts
 - Adventure Tour Activities
 - Trapping
 - Historic Attractions
 - Historic Courthouse (St. Georges)
 - Archaeological sites
 - Living Village
 - Authentic Aboriginal Cultural Events
 - Pow-Wow’s
 - Cultural Rituals
 - Aboriginal Day

5.2 Human Resources Skills

Analysis of the data presented in the industry primary and secondary research has identified numerous skills required by the participants in the tourism industry to meet market demands and for industry growth. Key skill sets needed include:

- Cultural/Historical Knowledge
- Technical Expertise
- Customer Service
- Leadership
- Management
- Sales/Marketing
- Business/Entrepreneurship

Through cross-referencing the skills required by industry and the skills indicated by the FNI membership, numerous matches for key skills for various tourism initiatives and areas of improvement have been revealed. Please refer to the table in Appendix F which highlights the matched skill and those needed in relation to the respective regions. The following points summarize the information found in the table. Please note that not all members of the FNI have the skills that are noted and some may have the skills that are noted as being

needed. The information presented is based on the results of the opinions expressed by those in attendance during the Band consultations.

Central – Kittiwake (Gander Bay & Glenwood)

Current Skills

- Knowledge of Culture, History, and Wildlife
 - Gander River
 - Outdoor Interpretation
 - Aboriginal
- Technical Expertise
 - Crafts
 - Culinary Arts

Skills Needed

- Technical Expertise in activities outside of noted areas of employment/interest
- Customer Service
- Leadership
- Management
- Sales/Marketing
- Business/Entrepreneurship

Central – Exploits (Sple'tk)

Current Skills

- Professional
 - Customer Service
 - Leadership
 - Management
 - Sales/Marketing
 - Business/Entrepreneurship
- Knowledge of Culture, History, and Wildlife
 - Aboriginal
- Technical Expertise
 - Various industrial/construction trades

Skills Needed

- Cultural, historic and wildlife knowledge
- Technical Expertise in relevant tourism activities

Western – Humber (Benoit's Cove & Corner Brook)

Current Skills

- Knowledge of Culture, History, and Wildlife
 - Marine/Fishery
 - Aboriginal
- Technical Expertise
 - Arts and Crafts
 - Marine/Fishery
 - Various industrial/construction trades

Skills Needed

- Technical Experience in activities outside of noted areas of employment
- Knowledge of culture, history, and wildlife outside the marine/fishery
- Customer Service
- Leadership
- Management
- Sales/Marketing
- Business/Entrepreneurship

Western – Long Range (Flat Bay, Indian Head, Port au Port, St. George’s)Current Skills

- Knowledge of Culture, History, and Wildlife
 - Marine/Fishery
 - Guiding
 - Music
- Customer Service
- Leadership
- Technical Expertise
 - Logging
 - Guiding
 - Music
 - Boat Building
 - Woodworking
 - Arts and Crafts
 - Marine/Fishery
 - Various industrial/construction trades

Skills Needed

- Technical Experience in activities outside of noted areas of employment/interest
- Knowledge of culture, history, and wildlife outside of Marine/fishery, Guiding, Music

6.0 RECOMMENDATIONS

As a result of the analysis, recommendations for the development of the tourism industry among FNI members has been broken down into three areas; tourism initiatives, skills development, and business mentoring. These areas of development are addressed in the order of their recommended implementation, as each initiative is often a prerequisite to the following to meet the tourism industry standards and funding requirements. It is noted that some FNI members and Bands will have the skills and resources required to move forward with the development of noted tourism initiatives, and therefore may not need skills development or assistance in the preparation of a business plan.

It is also noted that each of the tourism initiatives listed are concepts at this time. The initiatives will require further investigation to determine the market demand, human and financial resources, marketing requirements, and appropriate funding options.

6.1 TOURISM INITIATIVES

Below are the recommended tourism initiatives for each of the four regions encompassing the nine FNI Band Councils. Firstly, recommendations have been formed in reference to regional development opportunities and where possible opportunities for individual bands are identified. From these opportunities the perceived top five opportunities have been listed for Bands and individuals respectively.

Gander Bay/Glenwood (Kittiwake Coast)

The Gander region has been classified as a hub destination, which is defined as having a function as a service center for travellers in strategically located areas. Industry feels that hub locations should focus upon on strengthening services. It is noted that although the Gander Bay Band and the Glenwood Mi'Kmaq 1st Nations fall within this region they are somewhat off the beaten track from the major service centre of Gander. For this reason it is recommended that development in the band areas include demand influencing initiatives in addition to the strengthening of existing services.

Based on Band interest and industry research the recommended tourism initiatives are as follows for this region. Please note that these opportunities are listed with respect to the region only due to the lack of information gathered concerning the interests of the Glenwood Mi'Kmaq 1st Nations. The opportunities are listed in order of perceived priority.

1. Authentic Aboriginal Experience on the Gander River

The province and other industry authorities have repeatedly indicated that cultural and heritage experiences are in demand. Likewise, research indicated that experiences depicting the aboriginal way of life are of interest to many tourists, especially Europeans. The responding members in this region have also noted that they feel that there is great potential for tourism development around the Gander River.

This initiative could potentially encompass accommodations in the form of a lodge, and the delivery authentic aboriginal fishing and hunting experience, and theater performances, along with other activities of interest. It is important to emphasize the need for the product to be authentic in nature, as it will differentiate it from similar operations, and the accommodation will be demand orientated, which is currently noted as a secondary priority by industry for development.

The potential exists for this venture to be a band initiative or a partnership among interested band members. As a partnership, several businesses can be established i.e. accommodations, tour guide, theater company etc., with each business owner cooperatively providing their services, thus reducing the financial risks and generating greater economic benefits, while delivering a combination of services which are demand generating, prolong tourist stay's in the region, as well as extend the tourist season for participating operators.

2. Snowmobile Tours

Within Central and Western Newfoundland snowmobile touring is noted as being of higher priority than the remainder of the province. In addition to the noted potential by industry, the responding band members have indicated that they have an interest in such ventures. When investigating this opportunity in greater detail, the issue of guest snowmobile ownership versus rental should be examined as the potential may exist for the operation to offer rental service creating an additional revenue stream.

This initiative would best operate as an individual member business or as a partnership. The potential exists for cooperation with other tourism operators within the area to broaden the product offering to include accommodations and other related experiences. This initiative would help to strengthen the region winter tourism product.

3. Cultural Entertainment and Historical Attractions

Aside from aboriginal related cultural and historical entertainment and attractions, demand exists for the development of products depicting all aspects of Newfoundland and Labrador culture and history. Although neither the industry nor the responding members referred to any particular cultural/historical event for development, the potential exists for the band and/or individual members to identify a viable opportunity.

4. Other Winter Experiences

Winter activities such as ice fishing on the Gander River and cross country skiing were noted as being of interest by band members. The industry has placed this type of activity as third in development priority. The operation of such ventures is more suited to an individual member business. Should the membership decide to proceed with the development of these activities it is recommended that they do so in partnership with other tourism operators in the region as the services are not significant enough to draw demand on a stand alone basis.

Sple'tk First Nations (Grand Falls-Windsor, Exploits Valley)

The Exploits region has been classified as a tier 3 destination, with the community of Grand Falls-Windsor being noted as a hub destination. A tier 3 destination is noted as having some strong natural or cultural appeals but few attractions or services available. Development in this region should be approached as longer-term undertakings requiring more substantial effort and investment. As a hub destination the area is defined as having a function as a service center for travellers in strategically located areas. Industry feels that hub locations should focus upon on strengthening services.

Based on the interest of the Sple'tk 1st Nations Band Council and industry research the recommended tourism initiatives are as follows. The opportunities are listed in order of perceived priority.

1. Wig-Wam Point Initiative

During the consultation process the band council noted their current initiative, Wig-Wam Point, which included the development of an area aboriginal interpretative centre which would highlight an Aboriginal Day, Louis John and their Aboriginal dancers. The centre would also offer kiosks for members to display and sell crafts as well as offer a venue for the sale of tickets to other events. Industry research provides market support to this initiative as industry authorities have indicated that cultural and heritage experiences, and events are in demand. Likewise, research indicated that experiences depicting the aboriginal way of life are of interest to many tourists, especially Europeans. It is key to incorporate authentic aboriginal experiences into the centre such as the noted aboriginal dancers, due to the nature of the market demand. This project appears to fit within the development of a tier 3 destination, as it focuses on the development of the areas rich culture and history.

This venture is recommended as a band initiative which would offer individual member businesses the opportunity to offer and/or promote their services and/or products. Through offering tourism related member businesses the opportunity to showcase their products and services the centre can expand its product offering and therefore have a greater appeal to the market and will be seen as a destination. Likewise, the rental of kiosks is a possible revenue generator for the centre. This approach will also benefit the featured businesses through increased exposure, potentially increasing their revenue and expanding the economic benefits to the region.

2. Authentic Aboriginal Experiences

As noted above tourist demand exists for culturally rich experiences, and there is a perceived market niche for experiences specifically related to the aboriginal way of life. Building upon this market opportunity, the establishment of an authentic aboriginal village in the Red Indian Lake area has been identified. This living village will include a unique demand generating lodge style accommodation that can potentially offer authentic guided aboriginal fishing tours, interpretative tours of the Beothuk, dinner theater, and authentic cuisine among other attractions.

This initiative will most likely operate as a business venture undertaken by an individual or a cooperative partnership among interested band members. In the form of a cooperative partnership member businesses will be able to reducing financial risks for each other, as well as generate greater economic benefits. This approach will produce a demand generating packaged vacation experience for guests, which may prolong tourist stays in the region, as well as extend the tourist season for participating operators.

3. Exploits River Development

Industry and Band members have noted the numerous opportunities for development on the Exploits River. Within the adventure tourism sector potential for canoeing, kayaking, and guided fishing experiences have been identified. Outdoor adventure activities and outfitters have been noted as a second level priority for the provincial industry and are noted as being secondary in the ability to influence the shoulder and winter tourism markets.

Each of the identified adventure tour initiatives noted for the Exploits River are mostly suited to individual members interested in pursuing such tourism initiatives. Although these businesses are most likely to be operated by an individual it is recommended that the operators work cooperatively to package the experiences to offer potential tourists a greater overall experience on the Exploit River. This will potentially draw a greater customer base to the region as well as extend their stay. Likewise, the packaging of the tours will increase their marketability and revenue of each participant, while reducing individual business marketing expenses.

It is also note that these adventure tour opportunities can be tied to an aboriginal themed experience to broaden the target market as well as product packaging possibilities.

4. Snowmobile Touring/Trails

Industry has indicated that the development of snowmobiling trails has potential in Western and Central Newfoundland. Although snowmobile touring and/or trail development was not mentioned by the Sple'tk 1st Nations Band Council for development, the potential exists for development in this sector. Activity in this area would be best suited to an individual business venture. Partnership with others within the sector is also suggested to create packages which many be inclusive of accommodations, dinning and evening entertainment. Likewise, partnerships may allow the offering of extended touring experiences.

5. Other Opportunities

Cultural Entertainment and Historical Attractions

Aside from aboriginal related cultural and historical entertainment and attractions, demand exists for the development of products depicting all aspects of Newfoundland and Labrador culture and history. The flying boat re-enactment is one such event that has been recommended by industry for development. The possibility of developing other cultural/historical events and/or attractions exists for the band and/or individual members.

Other Winter Experiences

Winter activities such as snowshoeing were noted as being of interest by band members. The industry has placed this type of activity third in development priority. The operation of such ventures is more suited to an individual member business. Should the membership decide to proceed with the development of these activities it is recommended that they do so in partnership with other tourism operators in the region as the services are not significant enough to draw demand on a stand alone basis.

Corner Brook Band & Benoit's Cove Band (Bay of Islands)

The Bay of Islands region has been classified as a tier 2 destination. A tier 2 destination is noted as having some, but not sufficient critical mass of anchor attractions and should receive the next level of priority for further development. The City of Corner Brook is also noted as being a tier 2 destination. Based on the interest of the two band councils within this region and industry research the tourism initiatives are recommended as follows. The opportunities are listed in order of perceived priority.

1. Authentic Aboriginal Park – R.V. Sites

The Benoit's Cove Band has expressed interest in the development of an authentic aboriginal themed park. Such a park could host a sweat lodge, cultural rituals, performances based on the aboriginal way of life, and camping facilities. This initiative fits with the provincial view for historical and cultural attractions development. Likewise, industry has noted the development of natural scenic attractions, such as the waterfalls in the Sir Richard Squires Park, as having potential. Given the selected location for the Aboriginal Park its development could also appeal to this market niche.

This development can be implemented by the band council or by an individual band member. It is noted that a member of the Corner Brook Band is presently examining the development of a campground. It is recommended that a partnership between the respective band councils and the individual members be investigated to examine the possibility of establishing a tourism attraction which will benefit all involved.

2. Adventure Tours

Within the Bay of Islands region industry has noted that the development of skiing, snowmobiling, kayaking, hiking, river rafting, ATV touring, and boating tours to be among the greatest opportunities for development. Accompanying this opinion is the interest in such activities expressed by both band councils in the region. The Corner Brook Band expressed interest in snowmobiling and winter activities, while Benoit's Cove showed interest in developing certified walking trails. Likewise, the Benoit's Cove Band is examining the possibility of extending the Benoit's Cove Community wharf to accommodate tour boats and other water craft. This is thought to encourage stops to the area as well as be a suitable starting point for boat tours of the area. With the fit between band interest and

industry, it is recommended that the respective band members initiate development of these attractions.

It is noted that due to the type of business operation involved with the delivery of adventure tours that these initiative are suited mostly to individuals. Although, partnerships with other tourism operators should be sought to deliver a packaged experience to the region. This can result in greater economic benefits to the region through extending the tourist stay. Likewise, with the development of both summer and winter activities, such initiatives will help to achieve the objective of developing the region into a four season destination.

3. Accommodation

Industry does not currently see evidence of a shortage in accommodations in the region, but it is suggested that there is a need for upgrading hotel accommodations in Corner Brook, adding a four star facility, and a demand influencing style property. As well, adding additional capacity in Corner Brook to accommodate larger conventions has been noted. Although neither of the bands noted interest in establishing an accommodation, there exists the potential for the establishment of a demand style property. This could potentially include:

- *Smaller resorts, cottage resorts and lodges* having onsite or nearby recreational and other amenities, either housekeeping units or dining or both.
- *Character inns*, such as *country inns, heritage inns and professional bed and breakfasts*. These would exemplify the heritage architectural character of rural life or a former era, with a selection of interesting things to do and see onsite and in the area.
- *Other unique character accommodations* having comparable appeals, such as a converted lighthouse.

This initiative would be best suited to an individual band member who has previous experience in the accommodations sector. The possibility of an aboriginal themed accommodation exists for this development. Also partnership with other tourism operators to package related experience is recommended.

4. Captain James Cook Historical Attraction

Both the Corner Brook Band and the Benoit's Cove Band perceive the development of the historical significance of Captain James Cook as being an opportunity for the region. This initiative is inline with the industry perspective that there is demand for cultural and historical attractions and events. The development of the attraction can include an interpretation centre highlighting the historical events and significance, event reenactments which are interactive with the tourists and themed lookout and walking trails where possible. This initiative is regional and is recommended to be carried out through a band partnership, as well as in partnership/support from the regional economic development board and region tourism association.

5. Pinch Gut Lake

The Corner Brook Band noted perceived demand for the establishment of a hunting and fishing business at Pinch Gut Lake. This initiative could potentially encompass accommodations in the form of a lodge, and the delivery of authentic aboriginal fishing and hunting experiences, along with other activities of interest. Although industry has not directly noted hunting and fishing in this area as a develop priority, the potential exists for the initiative to build upon offering an authentic aboriginal experience, thus appealing to the desire to develop unique cultural experiences. The potential exists for this venture to be a band initiative or a sole proprietorship/partnership by interested band members.

Flat Bay Band, Indian Head 1st Nations, Port au Port Band & St. George's Band (Stephenville/Port au Port Peninsula Long Range)

The Long Range region has been classified as a tier 3 destination. A tier 3 destination is noted as having some strong natural or cultural appeals but few attractions or services available. Development in this region should be approached as longer-term undertakings requiring more substantial effort and investment. The community of Stephenville is also noted as being a hub destination. Based on the interest of the four band councils within this region and industry research the recommended tourism initiatives are as follows. It is noted that due to close proximity of the four band councils in this region there is tremendous potential for partnering. The opportunities are listed in order of perceived priority.

1. Aboriginal Showcase

Interest has been expressed from all four bands in the region to hold aboriginal events/celebrations. Each band has noted an authentic Pow-Wow, Aboriginal Day celebrations and other cultural rituals as potential for development. In fact, the Flat Bay Band has expressed previous success in organizing and performing a Pow-Wow. The desire to develop these initiatives is supported by the market research and industry consultations which indicated that cultural events are in demand. In fact, professional theatre and cultural entertainment has been noted by industry as being at a second level priority for development. Likewise, this initiative can be implemented in cooperation with the Stephenville Theater Festival which is compatible with industries noted opportunity to expand the festival programming into the Port au Port Peninsula.

This initiative is recommended to be developed under a partnership between the four regional band councils. With expressed interest from all and a noted willingness to work together on such an initiative, the councils will have a greater base of resources to draw upon. As well should each band embark on a similar initiative it may result in saturation in the region for the experience, resulting in a low attendance for each event. It is noted that this initiative may be subject to limited financial support due to the nature of the venture. For example ABC will not fund these events as they are not deemed as ongoing commercial businesses.

2. Bird Watching and Eco-Tourism (Stephenville Crossing/Sandy Point)

The development of Sandy Point and bird watching in the Stephenville Crossing area has been identified by the St. George's and Indian Head First Nations Band Councils as having perceived potential. The participants of the band consultations indicated that tourists to the area frequently inquire about Sandy Point and that the area is known for its wetlands and rare bird sightings. The focus on the Sandy Point attraction would be the island's history as Western Newfoundland's capital during the 1700's and 1800's. The island is also being considered as the province's first national wildlife designation, as there are three species of birds living on the island that are noted on the endangered species list. Likewise, the town of Stephenville Crossing has a Municipal Stewardship Agreement in place. The agreement promotes the maintenance of healthy populations of waterfowl, other species and water quality, opportunities for canoeing, hiking, photography, bird watching, and hunting, and to help residents and visitors learn more about nature, especially wetlands and waterfowl conservation.

Expressed development ideas for the Sandy Point attraction encompassed an interpretation and shelter area, along with walking trails, and guided bird watching tour packages for five to seven days. The development of these attractions fit within the industries view that natural attractions and experiences are in demand. In fact, the industry has indicated that the development of key natural attractions is a demand influencing first level priority and that the potential for extending the tourism season into the shoulder season is high.

In developing these attractions individual band members can establish packaged touring opportunities in the area for hiking and bird watching among other nature based excursions. To build upon the historical significance and natural attractions of Sandy Point, the interpretation centre should be established. The interpretation centre can be done as a cooperative effort between interested bands in the region. In addition to displaying facts regarding the attraction the interpretation centre can be home to kiosks for craft shops, food service, and tours, which in turn can generate revenue.

3. Historic Courthouse

The development of the Historic Courthouse has been identified by the St. George's Band as having perceived potential. It is noted that the development of the courthouse has already begun. The development of this attraction fits within the industries view that demand for cultural and historical sites and experiences is growing. As previously noted, the industry has indicated that the development of heritage attractions is a second level priority. Through the St. George's Band efforts, the development of this attraction will appeal to the industries desire to build community based cultural programs.

4. Development of the Lewis Hills

As previously noted industry has indicated that the development of the snowmobile industry within Western Newfoundland is exhibiting potential for growth. Likewise, the Newfoundland and Labrador Snowmobiling Federation has indicated that tourists are showing interest in snowmobiling in wilderness areas. With this information in mind the opportunity exists for the development of touring in the area of the Lewis Hills. Members of the Port au Port Band in particular noted the potential and interest in the development of the Lewis Hill,

Newfoundland's highest mountain. This development would include interpretation of the geographical and geological significance of the mountain, and trail development for hiking and winter snowmobiling.

This initiative can be initiated as a band project in the area of interpretation and then can be developed into individual member initiatives in the areas of hiking and snowmobile touring. To begin the initiative, product development must be commenced. This would include, but not be limited to, trail building and/or mapping, as well as interpretative and directional signage development. Since this project is regional in nature it is recommended that support be sought from the Regional Economic Development Board, the Newfoundland and Labrador Snowmobiling Federation, and other relevant industry authorities.

5. Cultural Entertainment and Historical Attractions

Aside from aboriginal related cultural and historical entertainment and attractions, and the development of Sandy Point and the St. Georges Historic Courthouse, there is potential for the development of the numerous other historical/cultural attractions. Industry research has indicated that demand exists for the development of products depicting all aspects of Newfoundland and Labrador culture and history. Through band consultations the following have been identified:

- Monument at Hungry Grove
- Devils Place
- Molly Ann's Cove
- Dolly's Lookout
- Calvery Hill
- Blanche Brook
- Black Bank Beach

Due to the regional nature of these attractions any one of the four bands could potentially initiate development. Being historic sites, interpretative tours, craft stores, and reenactment performances can be incorporated into the attraction as sources of revenue.

6. Other Opportunities

Crafts

Although industry authorities do not presently note craft development as a priority within the provincial tourism markets, interest in initiating craft shops and studios has been noted by the bands. Particularly, carvings produced from Labradorite and Gypsum has been noted by the St. George's Band.

These initiatives are most suited to individuals who have the artist skills and have interest in establishing an outlet for the sale and showcasing of their work. The possibility exists to incorporate crafting demonstrations/tours of the artist's studio into these ventures. The potential also exists for interested individuals to partner with other initiatives, i.e. interpretation centres, to offer their crafts for sale, display or demonstration. It is noted that many funding programs offered by the provincial and federal government departments and agencies do not support retail operations. ABC is an exception to this policy.

Archaeological Site

Interest in developing an aboriginal archaeological site has been put forth. At the present time the industry has set the development of archaeological sites as a third level priority. Although it is noted that the aboriginal ties to any developed site in the region may have a greater attraction level due to the interest in the aboriginal culture.

Should development of an archaeological site be initiated, it can be done as a cooperative effort between interested bands in the area or as an initiative undertaken by one band. To enhance the experience, authentic aboriginal performances depicting the way of life of the area natives can be implemented.

Prioritized Initiatives for Development

From the regional recommendations the top five perceived opportunities for the Bands and individual members have been put forth.

Band Initiatives

1. Sple'tk First Nations Wig Wam Point
2. Aboriginal Showcase (Bay St. George region Band cooperative effort)
3. Captain James Cook Historical Attraction (Bay of Islands region Band cooperative effort)
4. Sandy Point Interpretation Centre Development
5. Lewis Hill Interpretation Development

It is noted that the St. Georges Band Council has begun the development the St. Georges Historic Courthouse and continued work on this initiative is recommended.

Individual Initiatives

1. Gander River Aboriginal Themed Tours
2. Red Indian Lake Aboriginal Living Village and Accommodation
3. Bird Watching and Eco-tourism Tours (Stephenville Crossing/Sandy Point)
4. Authentic Aboriginal Park and R.V. Sites (Bay of Islands area)
5. Adventure Tours (Bay of Islands Region)

6.2 SKILLS DEVELOPMENT

The members of the FNI have skills in a wide range of industries and personal interest activities. Across each of the bands skills related to the fishery, trades, arts and crafts, the aboriginal culture appear to be the strongest. For those interested in tourism these skills can provide the knowledge needed and the technical ability to deliver a related tourism initiative. Outside of the noted key skills, individuals will have to obtain the necessary knowledge and technical abilities that are directly related to the tourism initiative that they wish to pursue.

The need to develop business management, sales and marketing, customer service, and leadership skills is also present across each of the bands. As with all business ventures business management skills are essential to the business viability. Strong management skills allow the entrepreneur to assign the appropriate resources available to the business and to direct staff. Similarly, sales and marketing skills are vital in gaining awareness for the products/services offered and securing revenue. Likewise, leadership skills are necessary from a staff management and business/initiative development perspective, as well as in a technical aspect for guiding and touring products. Customer service skills have been noted by industry as being of key importance in tourism, as tourists to the province expect a high level of service delivery.

It is recommended that members of the FNI who wish to pursue a tourism initiative primarily seek out training through on-the-job training and/or continuing education. Although enrolment in post-secondary tourism programs provide an avenue to acquire the necessary skills, some of the programs are limited to classroom experiences, are more costly, and encompass a greater timeframe to complete.

Recommended programs for training include:

Institution	Program	Duration	Delivery Method	Topics
College of the North Atlantic				
1	Tour Guide Operator Training	3 days	Workshop	Heritage, culture and history
Hospitality Newfoundland & Labrador				
1	SuperHost Atlantic	1 day	Seminar	Customer service & tourism awareness
2	E-Merit Program	Self Paced	On the job Self-Study	Service delivery of tourism profession chosen
3	It's Good Business - Be Responsible	1/2 day	Seminar	Alcohol risk management/ operating strategies
4	Food & Beverage Server	1/2 day	Seminar	Knowledge & skills required by food beverage servers.
5	Mature Consumer	1 day	Seminar	Senior's as customer service needs
6	Superhost: Sales Powered by Service	1/2 day	Seminar	Effective sales strategies
GMIST				
1	Canadian Avalanche Association Recreational Avalanche Course		Workshop	Survival training for winter tour operators
2	Edge of the Wedge: Innovation in Experiential Learning	3 days	Workshop	Culture, heritage, the arts, music, food and cuisine, and nature-based experiences.
3	Greening Your Business – Level 1	3 days	Workshop	Environmental responsible tourism practices
4	Legal Liability & Risk Management for Tourism, Hospitality & Adventure Tourism	2 days	Workshop	Risk Management
5	Snowmobile Safety, Ethics and Winter Interpretation		Workshop	Snowmobile safety training procedures, environmental ethics and codes of conduct, winter Interpretation
6	Sustainable Tourism: Good for Business & Community	2 day	Workshop	Small business networking & partnership building with industry professional

Programs are also delivered by various industry associations to their membership. Noteworthy associations delivering member programs are the Museum Association of Newfoundland and Labrador, and the Adventure Tourism Association of Newfoundland and Labrador. Interested FNI members should seek out membership in these associations and enroll in programs which they deem as necessary.

Aside from tourism orientated programs, Memorial University of Newfoundland through the division of Life Long Learning, and the College of the North Atlantic's Continuing Education Department offer a wide range of business management, leadership, sales & marketing, and customer service programs and courses for those interesting in developing these skills. It is recommended that those interested in pursuing these courses contact the respective institution for current course offering, delivery method and location.

Assistance

In pursuing skills development it is recommended that members utilize the current Individual Training (Skills Development) Program delivered by the FNI. This program provides qualifying members with funding for 100% of course fees to a maximum of \$18,000, as well as provides financial assistance in the areas of travel and child care cost. Likewise, through the Job Creation Program and the Wage Subsidy Program individuals interested in obtaining on-the-job training can work in partnership with existing tourism operators, providing benefits to both parties. The Aboriginal Client Relations Officers should be referred to regarding program funding availability.

Should individuals be unable to gain approval for training assistance through the FNI's programs it is suggested that applicants apply to the mainstream programs offered by HRSDC, if they meet the eligibility requirements.

In addition to the existing programs it is recommended that the FNI approach noted program delivering institutions, such as the College of the North Atlantic, GMIST, and Hospitality Newfoundland and Labrador, to develop several workshops to provide those interested in tourism with direction. Of special note is the investigation of the development of a program/course with Memorial University's Sir Wilfred Grenfell College in the area of Aboriginal Tourism, to complement the College's newly developed degree in tourism studies. Suggested workshop topics include, but are not limited to:

- Aboriginal Tourism Markets & Concepts
- Tourism Marketing
- Tourism Business Management
- Historical/Living Interpretation

6.3 BUSINESS MENTORING

Once training is obtained in the respective area individuals and/or interested bands need to develop a business plan which demonstrates the viability of the venture and address key concerns to funding agencies. Industry has indicated the following elements need to be addressed clearly and are essential in a strong business plan.

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- Applicants experience and education
 - Viability of the venture
 - Personal/Organization credit
 - Funding requirements and financial contribution to the venture
 - Partnerships
 - Employment creation
 - Competitive impacts

In many cases the interested bands and/or individuals will need guidance in the development of the business plan. This can include assistance in the some or all of the following areas:

- Market research
- Document writing
- Preparing financial projections
- Completing applications for funding

Assistance

Assistance can be sought from a qualified consultant when developing the business plan. To assist with covering the costs associated with hiring a consultant, FNI members can avail of funding provided by the following suggested agencies.

- FNI: Self–Employment Assistance Program
- ABC: Will offer financial assistance after the project has been approved and a Letter of Offer is in place.
- ACOA Consultants Advisory Services: A grant of 75 % of the consultants costs up to the maximum of \$5000.
- ACOA Women in Business Initiative - NLOWE: A grant for women of 75% of the consultants costs up to the maximum of \$5000.

Individuals/bands can also develop a business plan independently. Guidance for those wishing to do so can be sought from the Economic Development Officers with the provincial Department of Innovation, Trade and Rural Development, as well as from area Community Business Development Corporations.

With business skills among the membership being low, it is also recommended that the FNI examine the possibility of incorporating qualified Business Development Officers into their existing staff. Similar to the Aboriginal Client Relations Officers, two Business Development Officers should be considered, one for the central and one for the western region. The Business Development Officers can provide guidance to bands and/or individual members during the development of their business plan, completing funding applications, and during the initial start-up stage of the business, as well as during the growth of the business. It is important to note that the role of the Business Development Officer is to provide guidance and suggestions to the clients and not to prepare individual business plans.

In addition to the Business Development Officers, FNI should develop a list of pre-approved consultants with varying expertise. The list can be developed through a call for proposals for a standing offer, as is done by other agencies such as ACOA. This list can be referred to when recommending the assistance of a consultant to clients. Pre-approved consultants will provide clients with the needed direction in a timely manner while allowing the FNI to ensure service quality.

7.0 Conclusion

In conclusion, each of the nine FNI Band Councils has numerous opportunities for tourism development within their respective regions. In many cases the ideas presented match market demand and the direction in which the industry wishes to develop Newfoundland and Labrador tourism. To capitalize upon these opportunities individuals and bands need to ensure that they have the necessary skills and if not seek assistance in acquiring those skills needed prior to or concurrent with initiating projects. Likewise, the development of a strong business plan is essential to precede and gain support for the planned initiative. Key observations that have been made include:

- The importance of bands and/or individual band members to form partnerships to initiate larger regional projects.
 - The importance in creating authentic experiences for targeted markets.
 - The importance of developing packaged experiences to provide tourists with complete experiences, which distribute the economic benefits to the region, as well as prolong tourist stays.
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