REGIONAL TOURISM
NETWORKS AND SOCIAL-ENVIRONMENTAL WELLBEING
IN RURAL COASTAL COMMUNITIES

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Regional Tourism Networks and Social-Environmental Wellbeing in Rural Coastal Communities
Project Report, October 2017

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Table of Contents

Executive Summary

        Tourism development brings economic, social and cultural benefits to rural coastal communities. However, building the strong social networks necessary to maximize these benefits and contribute to the ongoing social-ecological wellbeing of communities remains a key challenge. Efforts to build up tourism as a form of community development and economic diversification have been ongoing in Newfoundland and Labrador for more than twenty years. Despite these efforts, tourism operators' perceptions of the benefits and challenges of tourism development, as well as the size and scope of their collaborative social networks, have not been widely examined in this province.

        Focusing on emerging and established tourism regions in Newfoundland and Labrador, the results of this project provide insight into tourism operators' perceptions of the industry, and allow us to better understand what factors facilitate or act as barriers to regional tourism network-building. In this final report, we provide the results of an online survey conducted with tourism operators in the Bonne Bay, Burin Peninsula, Labrador Straits, and Northern Peninsula regions.

The main research findings include:

- A large majority of participants perceive tourism development in Newfoundland and Labrador as an industry that provides both tangible and intangible benefits to host communities. These include: economic returns, community pride, quality of life, and greater appreciation for natural and cultural-historical resources.

- Survey participants identify the interplay between Newfoundland and Labrador's dramatic natural environments and its unique cultural heritage and historical sites as the greatest assets of tourism development.

- There is generally a high-level of agreement that tourism makes a positive economic impact. However, there are substantial regional differences in perceptions of the ability of tourism development to contribute to retaining people in the community, or job skills development and training. While still seen as benefits of tourism by the majority, there are some who disagree that these benefits exist.

- According to participants, the primary challenges to regional tourism development in Newfoundland and Labrador are related to human resource issues. There is a need for more entrepreneurs, volunteers, and workers in the tourism industry. There is similarly a need for more ongoing training and skills development in the sector, and for greater engagement by tourism operators in training and mentoring opportunities.

- Other key challenges identified by participants include a lack of financial support and learning to better access and use the financial supports that are available.

- A large majority of participants agree that collaboration is an important part of tourism development. However, only a minority of participants view regional collaboration as something that happens regularly, and a minority of participants report initiating these

collaborations themselves. This is the major "collaboration gap" identified in our research.

- Regional tourism networks are primarily developed through collaborative relationships at the local/municipal and provincial levels. Tourism collaboration relationships are generally less evident at the national or international scales.

- Overall, there appears to be a relative absence of collaboration with Indigenous groups and environmental non-governmental organizations. However, within the Labrador Straits and Bonne Bay regions there is more evidence for ongoing and desired collaboration with Indigenous groups, as well as a recognition of the increasing importance of these relationships.

- Participants view tourism as an industry that will become increasingly important over the next decade in comparison with sectors such as oil, forestry, government services, and fisheries.

- When participants were asked what they would do to support future tourism development in their region, they expressed a strong interest in the development of new cultural products, historical experiences, and outdoor activities. For some participants, a lack of financial support or investor interest pose challenges to realizing these potential futures. For others, the challenge is to develop the necessary skills to navigate the bureaucratic and legal requirements to access existing financial support.

Recommendations:

- Continue to develop a compelling Tourism Destination Image for Newfoundland and Labrador by promoting the combination of natural environment, and unique culture and heritage. This Tourism Destination Image could also be expanded to better incorporate more emerging regions of the province. Programs or initiatives that protect, enhance, and ensure the sustainability of the natural and cultural assets of our study regions will help support this Tourism Destination Image.

- Increase opportunities for job and skills training through tourism to help ensure that tourism development is pursued in ways that extend the benefits for host communities and the individuals and enterprises involved. Develop strategies to increase the level of engagement by tourism operators in existing and new training and mentorship opportunities.

- Create opportunities for tourism stakeholders to translate beliefs in the importance of network-building into practice by providing supports for new and ongoing collaboration. This will address the gap between the perceived significance of tourism networks, and lower levels of regular collaboration. This will require sensitivity to the context of each region regarding their histories of collaboration, as well as supporting existing key tourism organizations so they can more effectively serve as network-building hubs.

- Expand tourism networks to include more national, international and Indigenous collaborations. Current tourism network building and collaboration is focused at the local and provincial scales, among the tourism sector and government agencies, despite the national and global reach of tourism markets. Training initiatives recommended above could include skills development in network building that extends tourism collaboration both in terms of scale and in terms of the range of actors involved.

Introduction

Tourism development brings economic, social, and cultural benefits to rural coastal communities, including employment, skills development and community embeddedness, the preservation of tangible and intangible heritage, the protection of local environments, and a sense of community identity. Our cover image maps out keywords from our research focus groups and highlights that participants put people and community at the centre of their image of tourism development. However, doing tourism development in ways that contribute to social wellbeing comes with challenges and barriers that host communities need to address to successfully connect their local places to global networks of "tourism mobilities" (Sheller & Urry 2004).

Our research examines tourism sector participants' perceptions of the industry as a form of regional development, helping us to better understand the factors that facilitate or work against regional tourism network-building in four regions of Newfoundland and Labrador: Bonne Bay, the Burin Peninsula, the Labrador Straits, and the Northern Peninsula. Consistent with previous research by our team members, a key challenge for host communities is the ability to build strong social networks capable of maximizing their potential for tourism development, which in turn contributes to the social-ecological wellbeing of rural coastal communities (Stoddart & Catano 2015; Stoddart et al. 2014; Tucker et al. 2011). Strong regional tourism networks include both internal and external (bonding and bridging) connections to provide coordination and cohesiveness, but also to encourage innovation, adaption and market reach (Crowe 2007; Henriksen & Halkier 2009). Yet, emerging tourism regions such as the Burin Peninsula, Labrador Straits, and Northern Peninsula may face challenges in establishing and maintaining such networks (Gibson & Vodden 2010; Stoddart et al. 2014; Tucker et al. 2011).

This report provides results from an online survey focused on tourism operators' perceptions of the role that tourism can play in contributing to the social-environmental viability of rural coastal communities. In total, 34 people completed the online survey, with a 15% response rate. Our findings are limited by a relatively small sample and low participation rate, and should therefore be interpreted as suggestive and exploratory. To address this limitation, and to enrich our understanding through qualitative data collection, we also carried out focus discussions in each of our study regions. In total, 42 people participated in the focus groups.

The report begins by examining respondents' social, cultural, and economic perceptions of the tourism industry, and the benefits that it provides to host communities. Tourism development is viewed as an economic driver that provides a diverse suite of benefits – both economic and social/cultural – to host communities. However, regional comparisons complicate our understanding of these perceptions. While most participants agree that tourism provides social/cultural benefits, there is more variation in opinions about its economic impacts. More variation also emerges in participants' views about whether tourism contributes to residents' quality of life, provides skills and job training, and allows more people to live and work in host communities.

Next, we look at social conflict and challenges related to regional tourism development. According to our participants, conflict between individuals or groups on tourism-related issues is uncommon. However, regional comparisons show that participants from the Northern Peninsula

are more likely to have experienced social conflict related to tourism development. Where conflict does emerge, it is most often with municipalities and or provincial government. Key challenges to regional tourism development identified by our participants include a range of human resources issues, issues around accessing financial supports for small businesses and local initiatives, and issues of transportation, accommodation, and internet infrastructure. In our Bonne Bay focus group discussions, we also learned of several "challenges of success" that are specific to this region, including the need for increased housing for tourism employees, the need to shift perceptions of tourism as a viable career avenue for youth, and the need to adopt a more visitor-centric approach to envisioning the future tourism market for the area.

In the third part of the report, we examine collaboration and regional tourism network-building. A substantial majority of participants agree that collaboration is an important part of tourism development. However, only a small minority perceive of regional collaboration as something that happens "all the time," while a similarly small minority report that they initiate collaborations themselves. These findings highlight an important gap between perceptions of the importance of network building for regional tourism development and the ongoing practices of developing these regional tourism networks. Survey data suggests that the Labrador Straits and Burin Peninsula have the most engaged networks, while our focus group discussions suggest that the Bonne Bay region has an especially rich culture of regional collaboration and engagement. Participants in these more often report collaborating with national and international businesses, tourism organizations, governments, and occasionally with environmental groups. Among our survey and focus participants, those in the Labrador Straits and Bonne Bay indicate ongoing collaboration and increasing interest in working with Indigenous groups. By contrast, survey participants in the Northern Peninsula indicated lower levels of enthusiasm for collaboration and higher levels of conflict related to tourism development.

Our results suggest that tourism-related collaborative relationships are primarily local, and to a lesser extent provincial. These relationships are most often between participants, municipal governments, tourism organizations, and businesses within the province. Despite participants' general familiarity with social media tools like Twitter, Facebook, and blogs, which allow users to reach beyond their local or regional settings, there is less evidence of collaborative relationships that connect local tourism operators to national or international tourism networks. Our focus group discussions similarly highlighted a need to more effectively use digital communication tools within the tourism sector. This includes improving online bookability, as well as using social media to learn more about successful models elsewhere.

The final section of the report examines how participants envision the future of tourism development in their respective regions. When asked about the most important economic driver in their region today, 34 percent identified tourism and accommodation, which is not surprising for a sample consisting of tourism operators. But when asked what they believed will be the most important industry in the next ten years, 46 percent indicated tourism, with 32 percent choosing fisheries and fish processing. This was echoed in our focus groups, where participants also emphasized the increasing importance of tourism for their regions. When asked what the focus of regional tourism development should be moving forward, participants emphasized product development that showcases the unique heritage of their respective regions. Participants also emphasized "regional connections, and partnerships with neighbouring regions" as a focus for

future tourism development. Participants expressed interest in supporting future projects for tourism development, but stressed that financial supports from government and from private investors were necessary to ensure that these futures are realized.

Our data point to a "collaboration gap" between the perceived value of network building for tourism development, and the challenges of engaging in the day-to-day practices of collaboration and network building. The range issues identified by participants related to human resources and financial supports (availability of financial supports, as well as more effectively using existing supports) help explain why this collaboration gap exists. If network building is valued, but not supported with access to human resources and financial resources, collaboration gaps are the likely result. Given the importance of network building for successful regional tourism development, these collaboration gap limit the ability of host communities to leverage tourism to support social and economic wellbeing.

Results
1. Regional Assets and the Benefits of Tourism for Host Communities

Participants view tourism as an economic driver that provides a diverse range of benefits to host communities. Several survey questions gauge participants' perceptions of material benefits like skills training or economic growth, in addition to social and cultural benefits like increased quality of life, community pride, appreciation of the environment, and community embeddedness.

We asked a series of questions about how participants perceive tourism development in their region, with responses summarized in Table 1. Almost all participants, 97 percent, strongly agree that tourism is a source of pride for host communities. These extremely high levels of agreement carry through a range of other statements. More than 80 percent of participants agree or strongly agree that tourism tells important stories about local cultural or history, gives visitors an appreciation for the natural environment, and that it contributes positively to the community's quality of life. Participants also view tourism as an environmentally beneficial industry, with 80 percent disagreeing with the assertion that tourism development has negative environmental impacts on host communities.

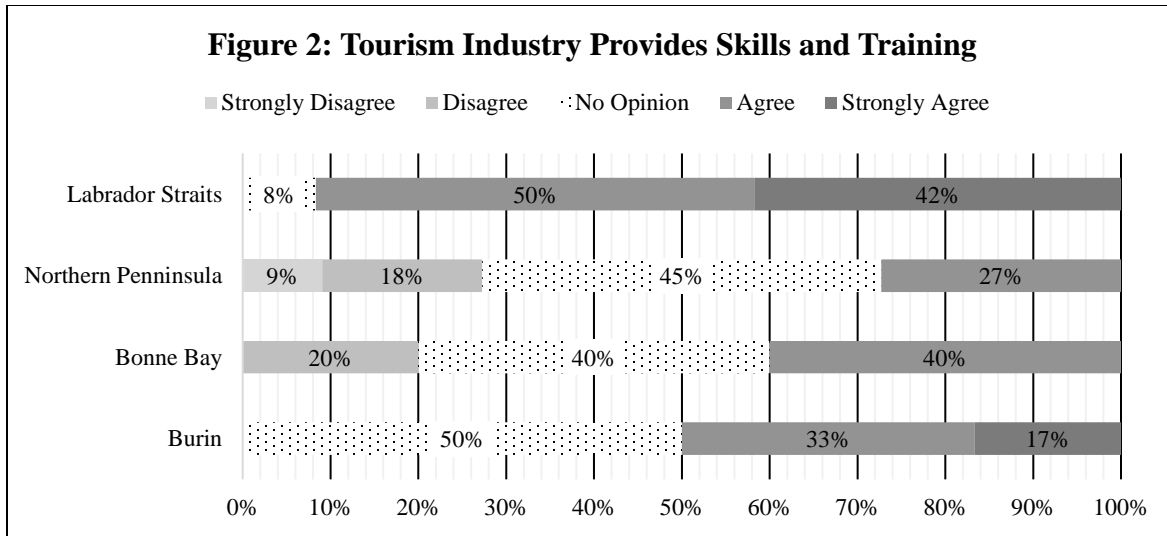| Table 1: Perceptions of Tourism Development					
Tourism development…	**Strongly Disagree**	**Disagree**	**No Opinion**	**Agree**	**Strongly Agree**
… is a source of community pride		3 %		60%	37%
…tells important stories about local history and culture			3 %	53 %	43 %
…gives visitors an appreciation of the region's natural environment			7 %	43 %	50%
…contributes to the host community's quality of life		7 %	7 %	30%	57 %
…provides training and skills development	3 %	7 %	30%	40%	20%
…allows more people to live and work in their home communities		7 %	14 %	48 %	31 %
…brings economic benefits				57 %	43 %
…brings cultural and social benefits		7%	3 %	57 %	33 %
…has negative environmental impacts on host communities	27 %	53%	7 %	13 %	

All our survey participants agree with the general statement that tourism creates economic benefits. However, when we look at more specific measures of the economic benefits of tourism, we see more variation. When asked if tourism development provides training and job-skills development, roughly 10 percent disagreed, and 30 percent had no opinion. Higher levels of disagreement or lack of opinion are also seen concerning outmigration and the ability of tourism

to contribute to community embeddedness: 7 percent of respondents felt that tourism development did not allow more people to live and work in their home communities, and almost 14 percent had no opinion.

In general, participants perceive tourism as having cultural and social benefits for host communities. However, regional comparisons of the survey data complicate this picture. Participants generally share agreement that tourism has positive social-cultural impacts in terms of community pride, quality of life, appreciation for natural environments, and the conveying important stories about local culture. However, as shown in Figure 1, there is more variance on the general question about whether "the tourism industry brings cultural/social benefits." While most participants across all regions agree or strongly agree with this statement, there is notable regional variation in the proportion of participants who disagree that tourism brings cultural and social benefits. In Bonne Bay, 20 percent of respondents disagree with the statement that tourism brings cultural and social benefits. By contrast, only 9 percent of Northern Peninsula participants disagree, 8 percent of Labrador Straits participants disagree, and no Burin Peninsula participants disagree.

Figure 1: Tourism Industry brings Cultural/Social Benefits
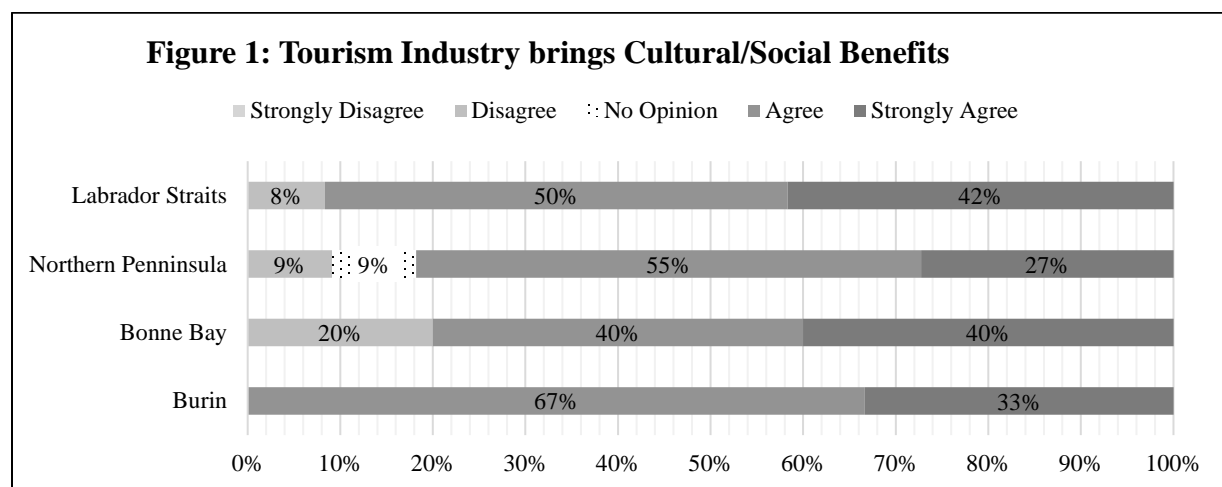
Statements linking tourism to job skills development and outmigration, and more general claims on the social/cultural benefits of tourism show the most dramatic variations. As Figure 2 demonstrates, 27 percent of participants from the Northern Peninsula either disagree or strongly disagree with the assertion that tourism provides skills and training, and 45 percent having no opinion. In Bonne Bay, 20 percent disagree that tourism provides skills and training while 40 percent have no opinion, and in the Burin Peninsula 50 percent of respondents had no opinion when it came to tourism as a conduit for job skills. Conversely, participants in the Labrador Straits are most likely to indicate that tourism development provides skills and training, with agreement that job skills development is a tourism benefit from over 90% of Labrador Straits participants.

Figure 2: Tourism Industry Provides Skills and Training

Legend: ■ Strongly Disagree ■ Disagree ⋯ No Opinion ■ Agree ■ Strongly Agree

| Region	Strongly Disagree	Disagree	No Opinion	Agree	Strongly Agree
Labrador Straits		8%		50%	42%
Northern Penninsula	9%	18%	45%	27%	
Bonne Bay		20%	40%	40%	
Burin			50%	33%	17%

Another way of looking at this question is to break down responses by their role within the tourism sector, rather than by region (see Table 2). We grouped survey participants based on whether they are operators and service providers, or whether they are affiliated with tourism-oriented government or community development organizations. As Table 2 shows, there seems to be a stronger perception among the government/community development participants that tourism provides skills and training. By contrast, more participants who are operators and service providers have no opinion, or disagree that tourism has this socio-economic benefit.

Table 2: Tourism Industry Provides Skills and Training (by participant role)

	Operator (accommodation, arts & culture, food service, guiding/outfitting)	Government/Community Development (heritage organization, municipal economic development, community tourism development)
Strongly Disagree	5%	0%
Disagree	11%	0%
No opinion	47%	0%
Agree	26%	67%
Strongly Agree	11%	33%

The question of skills and training was also discussed in our focus group meetings. Here, we heard that the training that is currently available is often too episodic and that one of the challenges in this area is a lack of engagement in existing training opportunities from many operators. As such so there is a need to encourage more operators to engage with ongoing training and mentoring around best practices and ongoing skills development. We also heard that more could be done to encourage learning from successful models. A specific idea along these

lines is to create more opportunities for tourism employees in emerging regions to travel for work exchanges in more established or successful tourism hubs.

As illustrated by Figure 3, when asked if tourism development allows more people to stay in their home communities, Bonne Bay participants were least likely to agree (60 percent), followed those in the Northern Peninsula (63 percent) and Labrador Straits (82 percent). By contrast, all Burin Peninsula participants agreed or strongly agreed that tourism allows more people to stay in the community. We also looked at this by participant role, but did not find any meaningful differences between operators and government/community participants on this question.

Figure 3: Tourism Industry Allows more People to Stay in Community
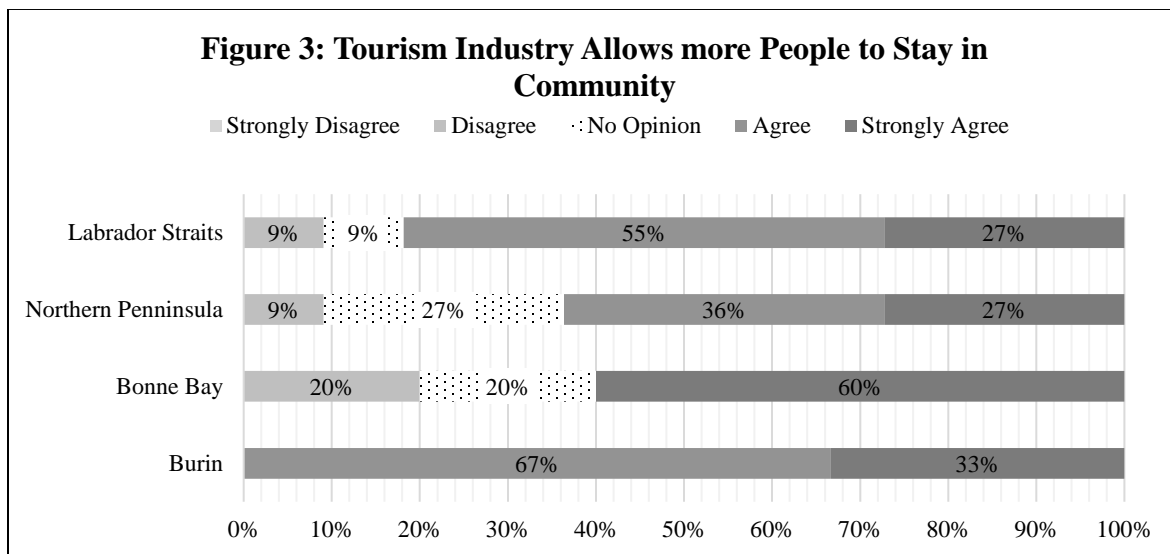
Moving onto a series of open-ended questions, participants were asked to identify the greatest assets for future tourism development in their region. Figure 4 uses social network visualization techniques to link the themes from the open-ended data (the grey circular nodes) to the study regions (the black square nodes). Node size reflects centrality (i.e. how well connected the node is to other nodes), while tie thickness reflects how often the two nodes are connected. This allows us to visualize the regional differences in the open-ended responses to the question of the greatest asset for tourism development.

Figure 4: What would you say is the greatest asset for future tourism sector development in your region?
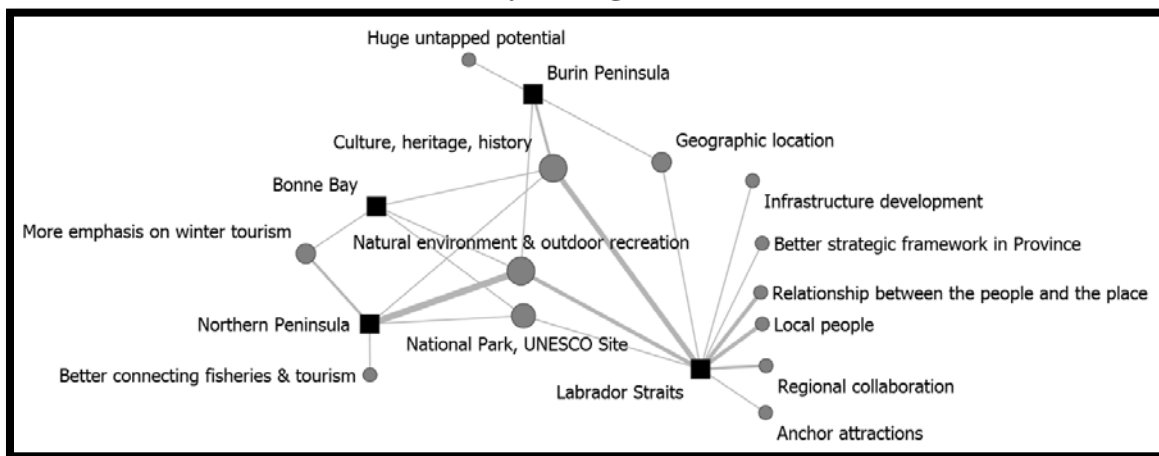
The most frequent themes were the "natural environment and outdoor recreation" and "culture, heritage, and history." A focus on the natural environment and outdoor recreation was shared by participants from all four regions, but especially among participants in the Northern Peninsula. The natural environment and outdoor recreation was also considered an important asset by Labrador Straits participants, although they placed even more emphasis on culture, heritage, and history. We see this dual emphasis on natural features and cultural specificity in the following response:

> The relationship between the people and the place, and the potential to develop new products based on that relationship, for example, walking tours, craft products, and experiences where visitors try a traditional activity, like bread making, or snow-shoemaking.

When describing assets for tourism sector development in their region, respondents also highlighted the "huge, untapped potential" of their "local people and nature," "geographic location," and "the relationship between the people and the place."

Others identified challenges specific to their area, such as the participant who noted, "With living in a national park, the tourism season needs to be promoted well beyond June, July, August. Local eateries and entertainment needs to extend beyond September." Similarly, another participant stated that, "there is an appetite for business development, but volume is too low to be full time and successful." Within these open-ended responses, we see that participants view their regions as spaces with untapped potential, but are realistic about the challenges that can inhibit the realization of this potential.

Overall, participants perceive tourism as an industry that provides both tangible and intangible benefits. According to our participants, the greatest assets of regional tourism development in Newfoundland in Labrador involve the interplay of the province's dramatic natural environments and its unique culture and history. There was more variation on perceptions of the ability of tourism development to contribute to training and skills development, or to retain people in the community. On the issue of training, our focus groups emphasized the importance

of ongoing training and mentoring, learning from successful models elsewhere, and increasing engagement in training opportunities by tourism operators.

2. Challenges of Regional Tourism Development

A series of survey questions focused on social conflict, as well as participants′ perceptions of other challenges related to tourism development. Participants were asked how often individuals and organizations come into conflict on issues related to tourism development in their region. As Figure 5 shows, 70 percent of participants perceived of conflict as occurring "not very often" or "sometimes," while a further 20 percent were not sure of how often conflict occurs in their region. Only 7 percent of participants reported a high level of conflict ("all the time").

Figure 5: In your region, howoften do individuals and organizations run into conflict?
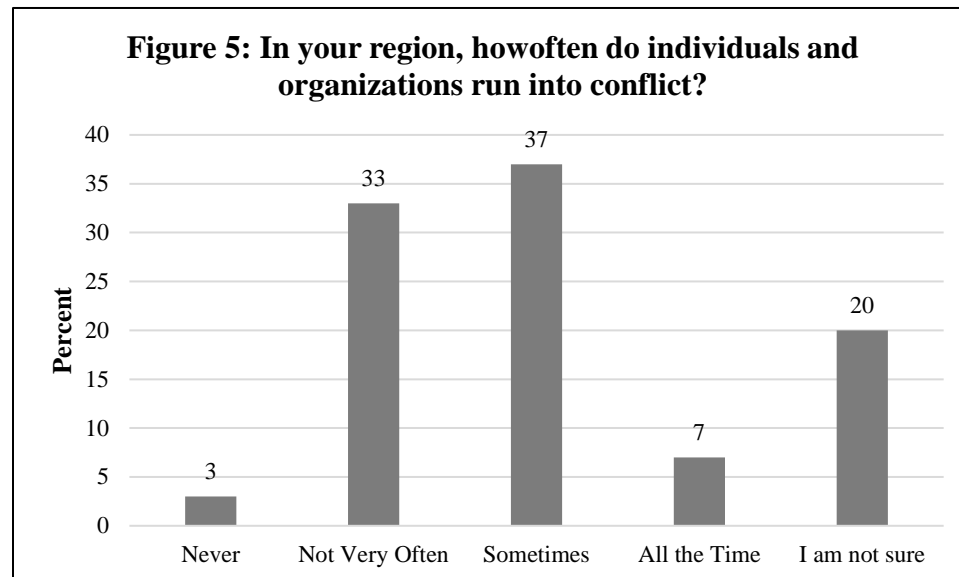
A regional comparison of this survey question, illustrated by Figure 6, suggests that participants from the Northern Peninsula were most likely to perceive conflict, with 17 percent reporting that conflict arises "all the time." By contrast, 50 percent of Labrador Straits participants perceive conflict arising "sometimes." Among Bonne Bay and Burin Peninsula participants, few participants perceived conflict (20 percent of Bonne Bay and 17 percent of Burin participants noted that conflict sometimes occurs).

Figure 6: How Often Conflict Arises Between Individuals and Organizations
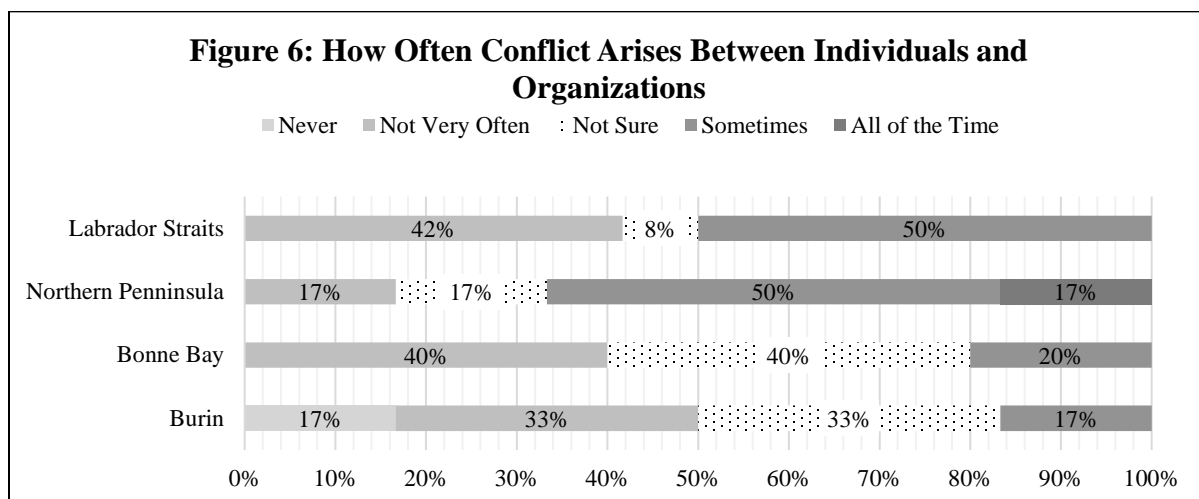
Our focus group discussions also add a layer of qualitative data to this question. In our Bonne Bay focus group, for example, we heard of tensions between some of the larger and smaller operators in the region. In the Burin workshop there was also a sense of tension around extending the benefits of tourism development beyond the regional hubs to smaller communities. Furthermore, in the more emerging regions in the study, there was also a sense of tension or frustration with well-established adjacent regions.

Through open-ended questions, participants were asked, if they have conflicts, to identify the top five groups they have conflicts with. Responses are visualized in Figure 7. This sociogram (social network diagram) illustrates connections between open-ended responses (grey circular nodes) and respondents' region (black square nodes). The thicknesses of these connections are weighted to convey the number of responses, and node size is weighted for network centrality (how well connected the node is to other nodes).

As Figure 7 illustrates, for participants from the Labrador Straits, Northern Peninsula, and Burin Peninsula, the provincial government is the most frequently cited organization involved in conflict with participating tourism operators and organizations. Participants from the Labrador Straits and Northern Peninsula also conflict with municipalities. By contrast, in our Bonne Bay focus group, we head that municipalities are often a key "missing link" in doing regional collaboration for tourism development and a desire that they should be more involved. Along similar lines, in the Northern Peninsula focus group, we heard that the town of St. Anthony has been playing a valuable pro-active role in supporting local tourism development.

Conflicts appear to arise with a diverse range of local or regional organizations and individuals. For example, Burin participants note conflicts with "group-unaffiliated tourism operators," Labrador Straits participants note conflicts with "local users" and a range of other groups, Northern Peninsula participants note conflicts with "local eateries" and "local business," and Bonne Bay participants note conflict with the Deer Lake Chamber of Commerce and the NL Snowmobile Association. Conflict also occurs with larger, non-local organizations including Nalcor, Parks Canada, or simply, "government."

Figure 7: If you have conflicts, which are the top five groups you have conflicts with?
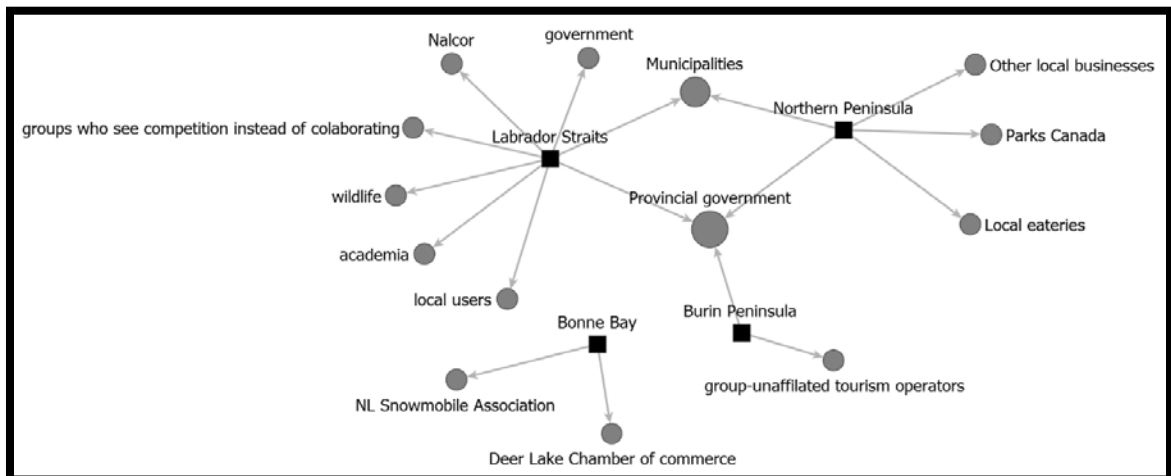
Through open-ended questions, participants were also asked to expand on what they consider to be the main challenges to tourism development in their region. Figure 8 provides an

overview of the responses (circular grey nodes), which are linked to participants' regions (black square nodes).

Figure 8: What would you say is the region's greatest challenge to tourism development?
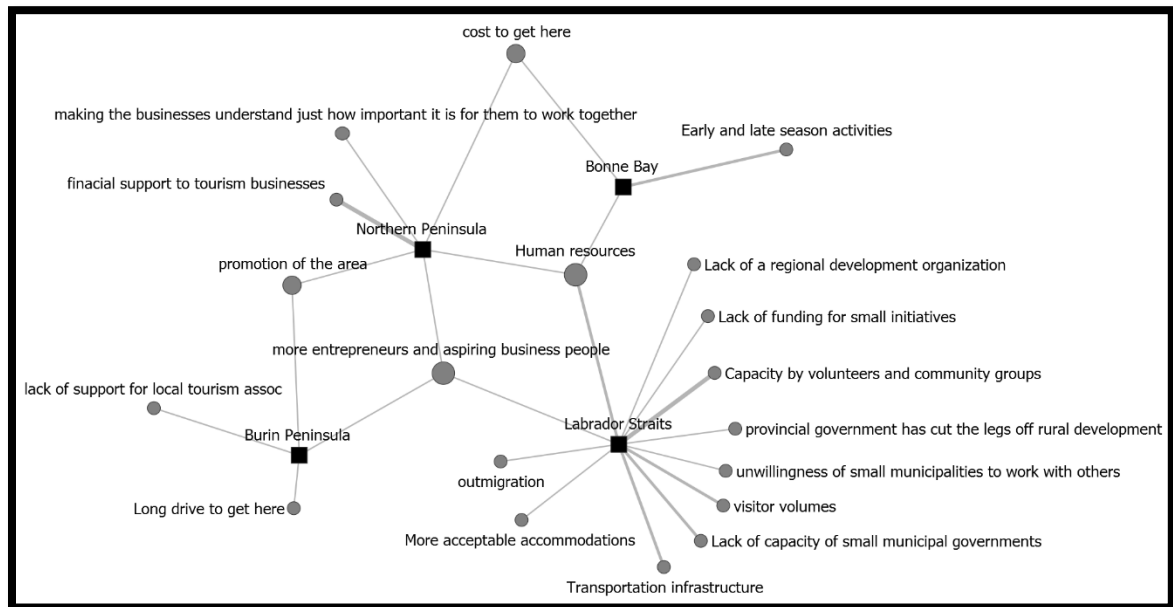
For participants from Northern Peninsula, Labrador Straits, and Burin Peninsula, the most frequent responses concerned issues of "human resources." For example, one participant mentioned human resources alongside structural improvements, noting that there is a "desperate need for more entrepreneurs and aspiring business people. More acceptable accommodations meeting traveller's needs." Participants from Labrador Straits emphasized challenges associated with the capacity of volunteer and community groups. One participant expands on the challenge of human resources, particularly in relation to volunteers, in the excerpt below:

> The region's population is small, and aging. In the past, tourism development relied heavily on volunteers. Previous volunteers are getting older and retiring. Younger volunteers are few because of out-migration of young people, and changing attitudes towards volunteer work. The answer is core funding for organizations to allow hiring of paid employees for tourism development work, but this is disallowed by federal/provincial funding agencies.

Conversations about the varied challenges associated with human resources also came up repeatedly across our focus group meetings. Among the key themes related to human resources are: issues of the capacity of volunteers and community groups to engage in tourism development projects; the need to draw more entrepreneurs and business people into the sector; the need to attract and retain more youth within the tourism sector; the need to better balance the mix of volunteers, workers, and entrepreneurs within regional tourism development; and the need to better support local tourism associations. In talking about how to possibly address these

challenges, we heard that new retirees are potentially a great resource for contributing to regional tourism development, both as business people and volunteers.

Participants, particularly those from the Northern Peninsula, also identified "financial support to small businesses" as a significant challenge to regional tourism development, with participants explaining that there is:

> "No financial support to tourism businesses to upgrade facilities and quality standards. It's difficult to achieve that standard that tourism expects without financial support because we are so seasonal!"

Another participant identifies a challenge in:

> "The lack of funding for small initiatives, for example, funding for small craft workshops. Lack of capacity of small municipal governments, and unwillingness of small municipalities to work with others."

We also discussed the issue of financial resources in our focus groups. While there was agreement about the need for financial supports for tourism development, this idea was also challenged. Instead, focus group participants noted that resources are there, but that the issue is that operators and other tourism groups need to learn how to use them. One of the challenges here is the need to learn to navigate the bureaucratic and legal requirements for funding support, and that training and mentorship along these lines is valuable.

In the Bonne Bay workshop, quite a bit of discussion centred on the need for housing for tourism employees. This is a unique challenge to that area, which links issues of human resources and financial supports. This is also seen as a key challenge for continuing the development of the Bonne Bay region as a successful tourism hub, and may be a key area for future collaboration across government and tourism sector actors.

The Bonne Bay workshop also identified several other unique themes that were not as prevalent as in other focus groups, including that: tourism is not perceived as a valued long-term career option for youth; that a more visitor-centric approach to tourism planning needs to be developed, in terms of planning for future markets; that it is important to cultivate an awareness that competition for visitors is "not across the road, but across the world," and that a greater awareness and commitment could be developed about "green" or environmentally sustainable tourism practices. As the most established tourism hub among our study regions, we believe that these "challenges of success" identified by our Bonne Bay focus group are particularly worth attending to and learning from.

Alongside the need for skilled workers and financial support, transportation infrastructure is another challenge identified by participants. For example, the "long drive down to the Burin area" and "transportation infrastructure" were noted as impediments to tourism development by Burin and Labrador Straits participants. The focus group discussions shed further light on infrastructure challenges in our study regions. Transportation infrastructure came up as a challenge in the focus groups, such as perceptions of poor road quality being a deterrent to potential visitors to the Northern Peninsula. In the Burin focus group, however, some participants challenged the idea of the "long drive down to the Burin" as a perceptual barrier and argued that

it is not much longer than the drive to the Bonavista Peninsula, which is experiencing increasing tourism development. Issues of accommodation capacity and quality for visitors were also raised. Another infrastructure challenge, which is particularly pronounced in the Labrador Straits, is poor internet infrastructure. Participants noted that investing in community infrastructure to address these challenges would be mutually beneficial for tourism development and for communities more generally.

Overall, we see that reported conflict between participants' organizations and other individuals or groups is not widespread. However, regional comparisons, participants' open-ended responses, and the focus groups provide valuable insights into where and with whom conflicts arise concerning regional tourism development. Responses from the Northern Peninsula and Labrador Straits suggest higher levels of social conflict than elsewhere. In both regions, participants identify the provincial government and municipalities as the main groups they have conflicts with. In terms of challenges, participants identified human resources issues – the ability to hire, train, pay, and retain workers and volunteers – as a primary challenge to tourism development. Lack of financial supports and the need to better use existing supports were also identified as challenges to tourism development. Particularly important areas for further development include accommodation improvements, housing for tourism workers, and improvements to community transportation and internet infrastructure.

3. Collaboration and Regional Tourism Network Building

We asked a series of questions to examine participants' social networks as they pertain collaborations with other groups involved in regional tourism development. For participants, collaboration is extremely important. As illustrated in Figure 9, about 97 percent responded that collaboration is "somewhat" or "very" important.

Additionally, we asked participants how they perceived levels of regional collaboration, and how often they personally initiated collaborations with other stakeholders or groups. The results are summarized in Table 3. Roughly 87 percent of participants believe that collaboration is something that happens "not very often" or "sometimes." When asked how often they personally initiate collaboration, 45 percent responded that they "never" or "not very often" initiate collaboration, and only 10 percent responded that they do it "all the time." As such, while nearly all participants agree that collaboration is an important dimension of tourism development, participants report that there isn't much collaboration going on, and they aren't initiating these collaborations themselves.
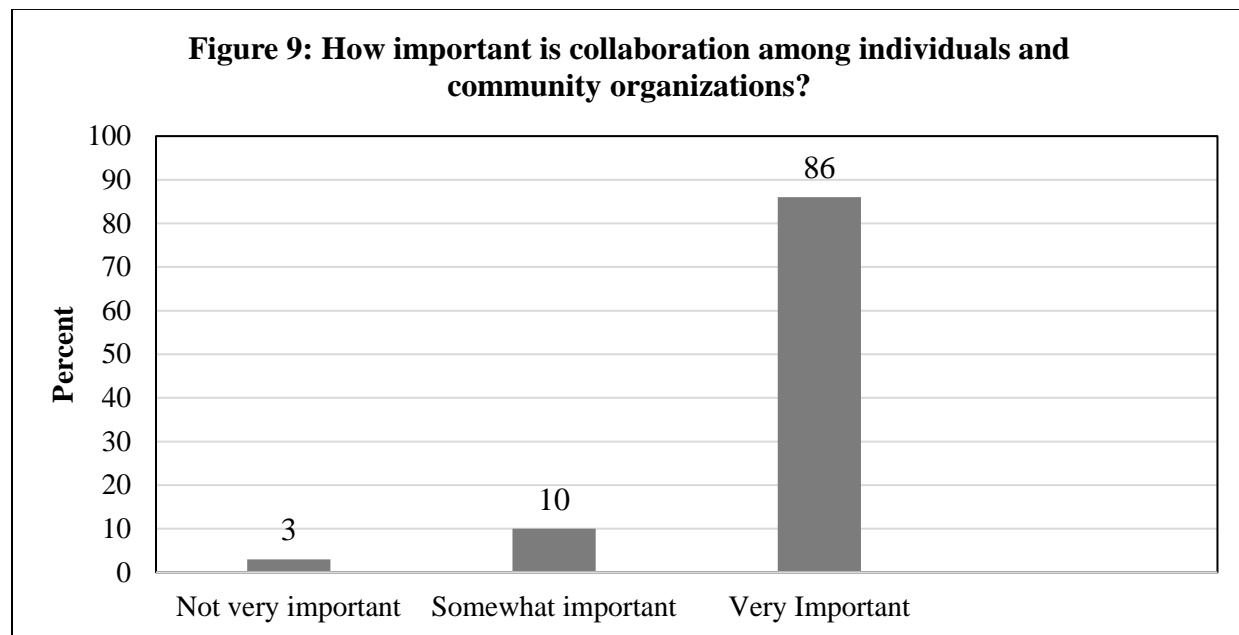

Figure 9: How important is collaboration among individuals and community organizations?

Table 3: Collaboration and Network Building in Regional Tourism Development					
	Never	Not Very Often	Sometimes	All the time	I am not sure
How often do individuals and organizations work together on tourism development in your region?	3%	27%	60%	7%	3%
How often do you personally initiate collaboration initiatives with other stakeholders or groups?	20%	28%	36%	12%	4%

When we asked participants to describe their past involvement with tourism planning, 62 percent of participants who reported that they were "somewhat" and "very" involved in tourism planning and initiatives in the past (see Figure 10). Yet, 38 percent describe their past involvement with tourism planning and initiatives as either "not involved" or "only very occasionally involved," a pattern that does not appear to show substantial regional variation. This further suggests a gap between the perceived importance of collaboration and actively engaging in collaboration through tourism planning.

Figure 10: Which Best Describes Your Past Involvement with Tourism Planning?
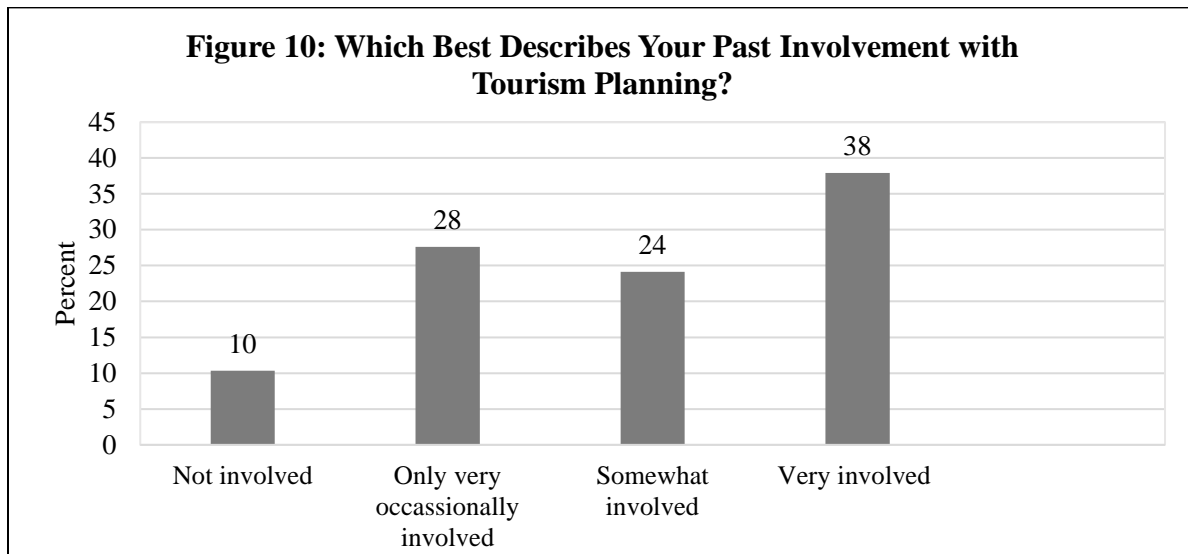
Our focus group discussions shed light on this "collaboration gap" between the perceived value of collaboration and network building, and the actual practice of doing this work. Key themes were that it is difficult to get people around the table to engage, that there is a lack of engagement from operators, and that available time is the major constraint for network-building work.

Moving onto open-ended questions, we asked participants to identify the five groups or organizations that they work or partner with. Their responses are mapped onto the sociogram (network diagram) in Figure 11. This shows connections between the listed organizations (grey circular nodes) and the region of respondents (black square nodes), with node size adjusted for

centrality (how well the node is connected to other nodes) and tie width adjusted how frequently the nodes are linked. Two responses stand out: The Department of Tourism, Culture, Industry and Innovation (TCII; formerly Business Tourism Culture and Rural Development or BTCRD), other private business owners, and a general category of "local, regional attractions" Respondents from all four study regions partnered with the TCII (formerly BTCRD). The category "other local, regional attractions" includes mentions of specific tourism attractors such as Gros Morne National Park, Labrador Straits Museum, L'Anse aux Meadows, and Norstead Village. Other relationships were unique to the Labrador Straits region, with the Labrador Straits Historical Development Corporation and Destination Labrador (a Destination Management Organization) accounting for a several responses. On the Northern Peninsula, multiple participants also noted the Destination Management Organization and Parks Canada. Participants' responses reflect a pattern of collaboration that we will explore more in the next section: strong networks of local collaboration, but increasingly diffuse networks of collaboration moving to the provincial and national scales.

Figure 11: What are the top five groups or organizations you work or partner with?
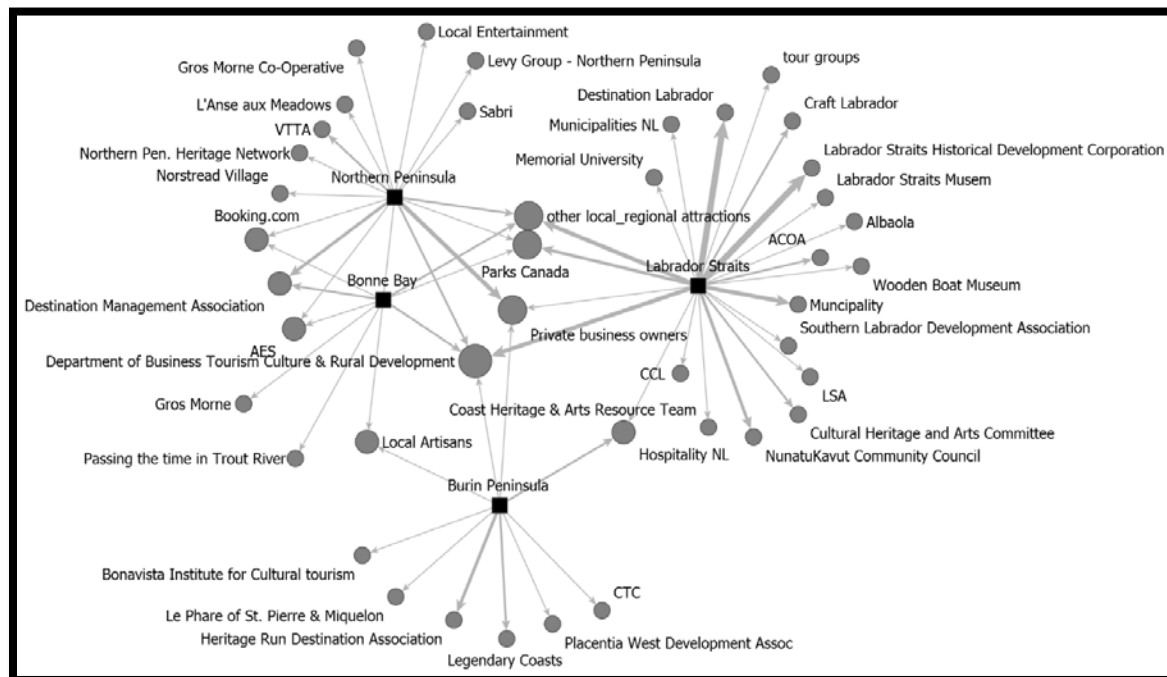
Participants were also asked which organizations they would like to work with over the next year on projects related to tourism development, and their responses are illustrated in Figure 12, which links named organizations or individuals (grey circular nodes) to region of response (black square nodes). Again, we see Labrador Straits participants' desire to collaborate with the Labrador Straits Historical Development Corporation, along with a local cultural heritage and arts committee. Participants from the Labrador Straits and Northern Peninsula both repeatedly expressed an interest in working on tourism related projects with Parks Canada. Participants in both the Northern Peninsula and Labrador Straits highlighted local governments as future collaborators, along with the provincial tourism department. Participants in the Burin Peninsula

and Labrador Straits also shared an interest in working further with Hospitality NL. Across the different study regions, participants also listed a wide range of local tourism and heritage organizations that they hope to work with.

Figure 12: What are the top five groups or organizations you would like to work with in the next year on specific projects related to tourism development?
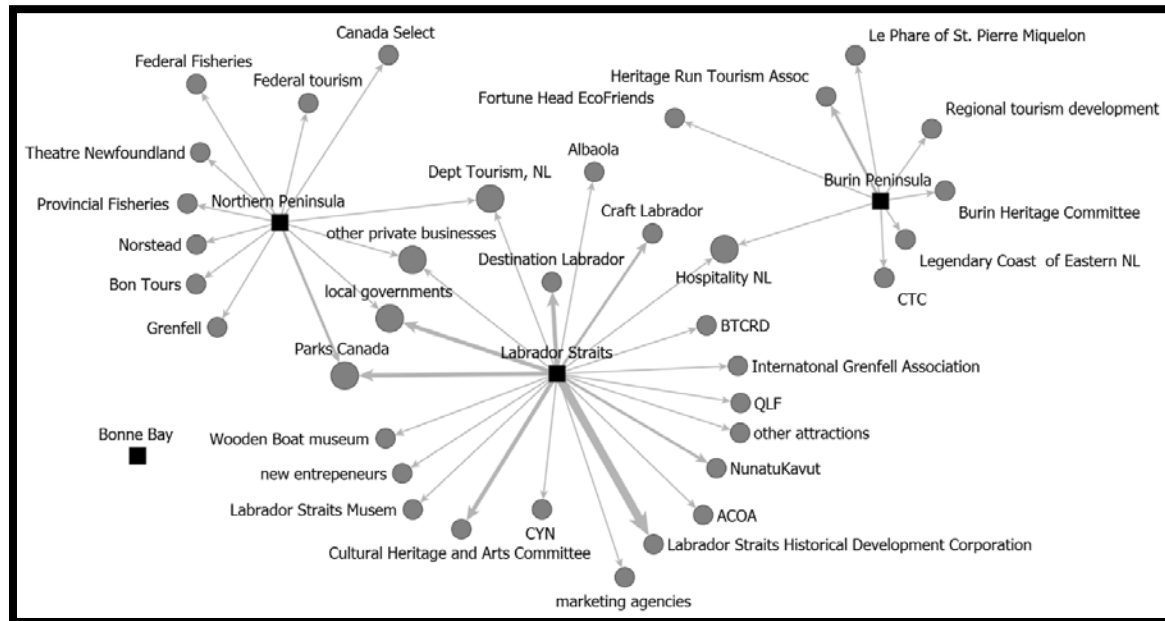
Overall, participants perceive of collaboration between individuals and groups as an important dimension of tourism development. Notably, while municipal governments and the provincial government are named as the organizations that participants most often run into conflict with, their responses indicate these are also the organizations they hope to work with on tourism development issues.

In analysing our focus group notes, we also looked at which organizations or groups were specifically identified by participants in our discussions, which also sheds like on key actors for potential collaboration. In Bonne Bay, we heard quite a bit about Parks Canada as an excellent partner for collaboration. Other groups that came up included Destination Management Organizations, Hospitality NL, TCII, UNESCO, the Gros Morne Cooperating Association, and Qalipu Mi'kmaq First Nation. In the Labrador Straits, specific groups or organizations mentioned included UNESCO, Nunacor, Battle Harbour, and the Quebec-Labrador Foundation. In the Burin Peninsula workshop, specific groups or organizations included the Heritage Run Tourism Association, which is seen as potentially playing a key role as a hub organization for regional tourism development, as well as the Wave Energy Research Centre.

Most participants view collaboration as an important aspect of tourism development. However, there is a gap between the perceived importance of collaboration and the practice of collaboration. Fewer participants perceive collaboration as something that is occurring regularly, and fewer still initiate these collaborations themselves. When asked which organizations they do collaborate with and would like to collaborate with in the future, participants primarily identify local tourism organizations and sites, while also naming specific key provincial and national

organizations. We will further explore the issue of the scale of tourism collaboration networks in the next section.

The Scale of Collaborative Social Networks in Tourism Development

A series of questions explored the reach of participants' social networks, examining how these networks expand outward and link regional tourism operators to one another, as well as to provincial, national, and international organizations and groups. Table 4 summarizes the responses.

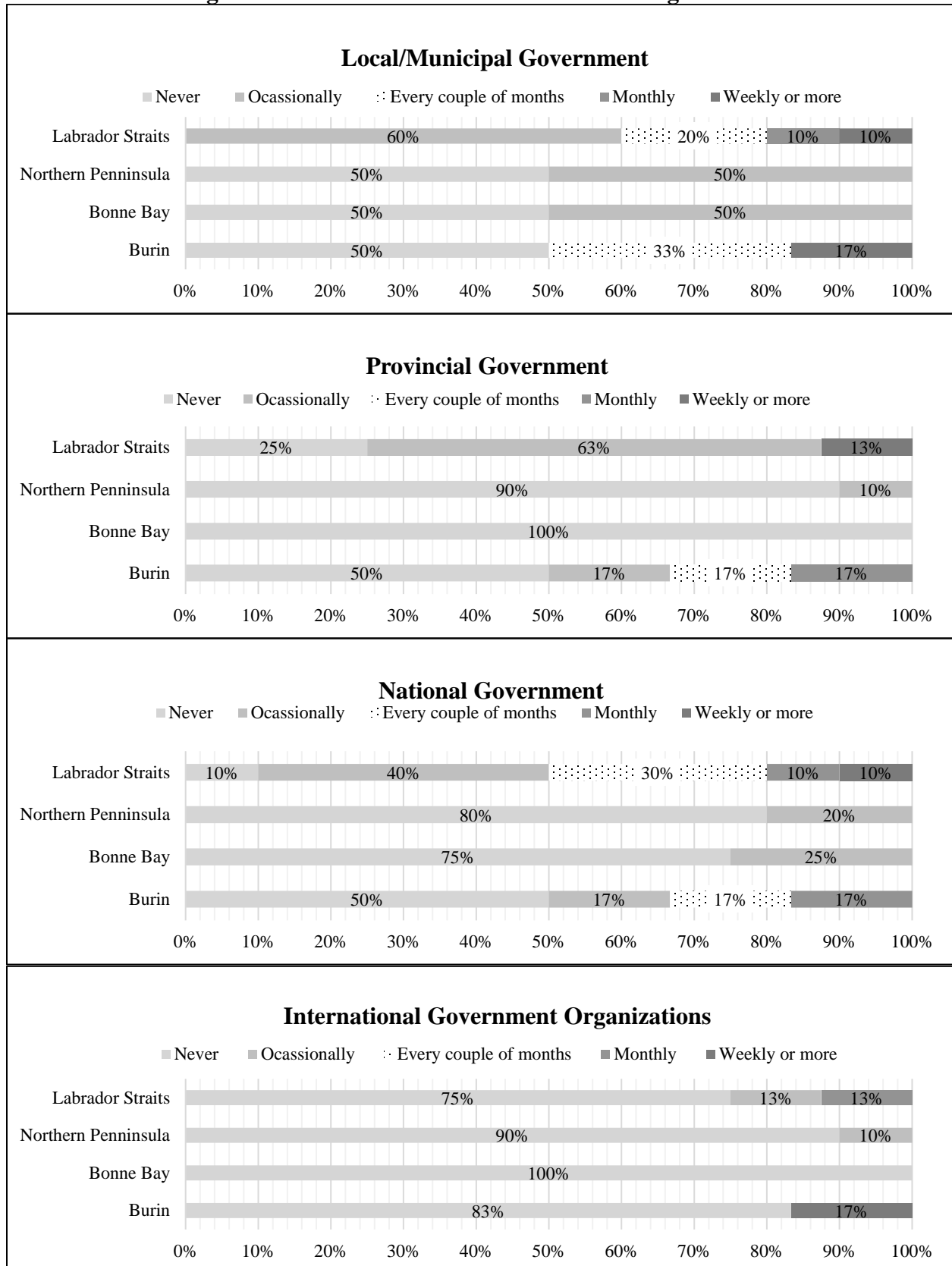| Table 4: How often does your organization work with other organizations or individuals on issues related to tourism development?					
	Never	Occasionally	Every Couple of Months	Monthly	Weekly or More Often
Local (community/regional)					
Tourism Organizations	22%	33%	22%	7%	15%
Businesses	33%	41%	4%	11%	11%
Government Organizations	30%	44%	15%	4%	7%
First Nations or Indigenous Groups	59%	26%	4%	4%	7%
Environmental Organizations	65%	23%	8%	4%	-
Provincial					
Tourism Organizations	19%	48%	11%	15%	7%
Businesses	64%	24%	4%	4%	5%
Government Organizations	37%	30%	11%	11%	11%
First Nations or Indigenous Groups	73%	15%	4%	-	8%
Environmental Organizations	62%	27%	8%	4%	-
National					
Tourism Organizations	64%	32%	-	4%	-
Businesses	80%	16%	-	-	4%
Government Organizations	48%	26%	15%	7%	4%
First Nations or Indigenous Groups	92%	4%	4%	-	-
Environmental Organizations	84%	12%	4%	-	-
International					
Tourism Organizations	76%	12%	-	12%	-
Businesses	80%	12%	-	-	8%
Government Organizations	84%	8%	-	4%	4%
Environmental Organizations	96%	4%			

Responses cluster around tourism organizations, businesses, and government at the local and provincial levels. Looking at local tourism organizations, 22 percent of participants work with them "every couple of months" with a combined 22 percent collaborating "monthly" or "weekly or more often." The number of reported collaborations decreases slightly at the provincial level, but remains relatively high – especially when compared to the low levels of collaboration seen between participants and national or international organizations.

The data suggests a general lack of collaboration between participants and Indigenous groups and environmental organizations. These low levels of collaboration are consistent at all levels: local, provincial, national, and international. At the local or municipal level, roughly 85 percent of participants "never" or "occasionally" work with local Indigenous or groups. Conversely, at the local level, 7 percent of participants work with Indigenous groups "weekly or more often." At the provincial level, 8 percent show similar levels of collaboration. A similarly low rate of collaboration with environmental groups was reported, with 88 percent of respondents noting they "never" or "occasionally" work with local environmental groups.

The next series of figures provides a more detailed regional comparison of the scale and sectors that characterize our participants' collaborative relationships (see Figures 13-15). We focus on the three sectors that show more regional variation (government, Indigenous groups, environmental organizations) and leave aside tourism organizations, as a regional comparison does not yield new insight beyond the results reported in Table 4. Regional comparisons of the survey data suggest that the Labrador Straits and Burin Peninsula may have the most engaged regional tourism networks. Based on our survey data, the collaboration networks in the Labrador Straits and Burin Peninsula includes a broader range of sectors and are more connected to the national and international scales. Figure 13 illustrates survey participant responses to questions about collaboration with various levels of government. Even though government collaboration in general is strongest at the local and provincial level, and weaker at the national and international level, this regional comparison shows that survey participants from the Labrador Straits and Burin Peninsula report collaboration with government agencies at the local, provincial, national, and international level more often than participants in the other regions.

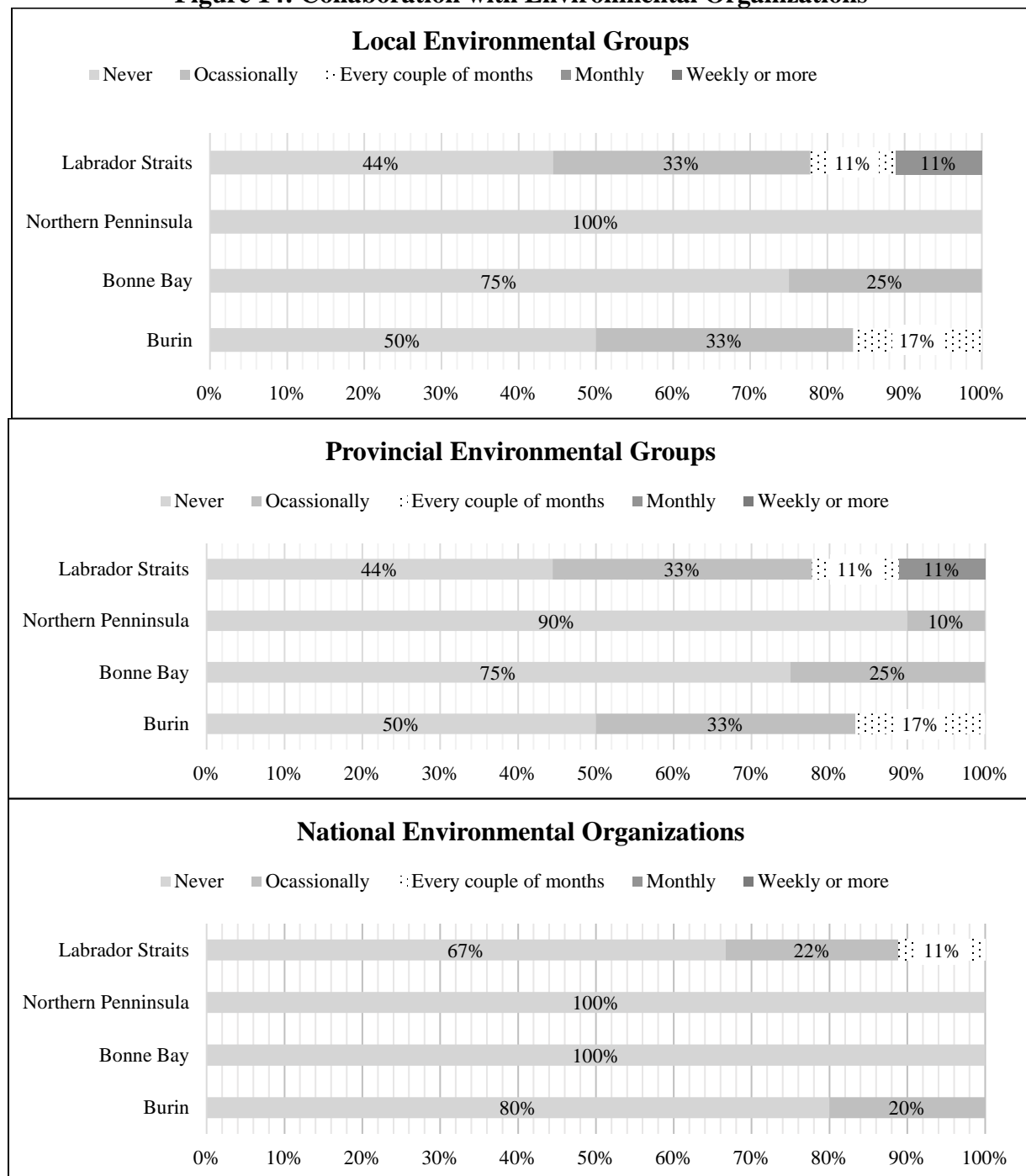It is important to note that these regional comparisons should be interpreted with caution based on our relatively small sample. Our Bonne Bay workshop participants pushed back on this finding and provided rich accounts of the culture of collaboration in this region. Furthermore, in our focus group discussions we gained the impression that the Bonne Bay region is most connected to national and international partners.

Figure 13: Collaboration with Government Organization

Local/Municipal Government

■ Never ■ Ocassionally ⋮ Every couple of months ■ Monthly ■ Weekly or more

Region		
Labrador Straits	60% / 20% / 10% / 10%	
Northern Penninsula	50% / 50%	
Bonne Bay	50% / 50%	
Burin	50% / 33% / 17%	

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Provincial Government

■ Never ■ Ocassionally ⋮ Every couple of months ■ Monthly ■ Weekly or more

Region		
Labrador Straits	25% / 63% / 13%	
Northern Penninsula	90% / 10%	
Bonne Bay	100%	
Burin	50% / 17% / 17% / 17%	

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

National Government

■ Never ■ Ocassionally ⋮ Every couple of months ■ Monthly ■ Weekly or more

Region		
Labrador Straits	10% / 40% / 30% / 10% / 10%	
Northern Penninsula	80% / 20%	
Bonne Bay	75% / 25%	
Burin	50% / 17% / 17% / 17%	

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

International Government Organizations

■ Never ■ Ocassionally ⋮ Every couple of months ■ Monthly ■ Weekly or more

Region		
Labrador Straits	75% / 13% / 13%	
Northern Penninsula	90% / 10%	
Bonne Bay	100%	
Burin	83% / 17%	

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Collaborative work with environmental groups is low overall. However, regional comparison shows that responses from the Labrador Straits and Burin Peninsula suggest exceptions to this pattern (see Figure 14). Responses from the Labrador Straits and Burin Peninsula more often indicate collaboration with local, provincial, national, and international environmental groups.
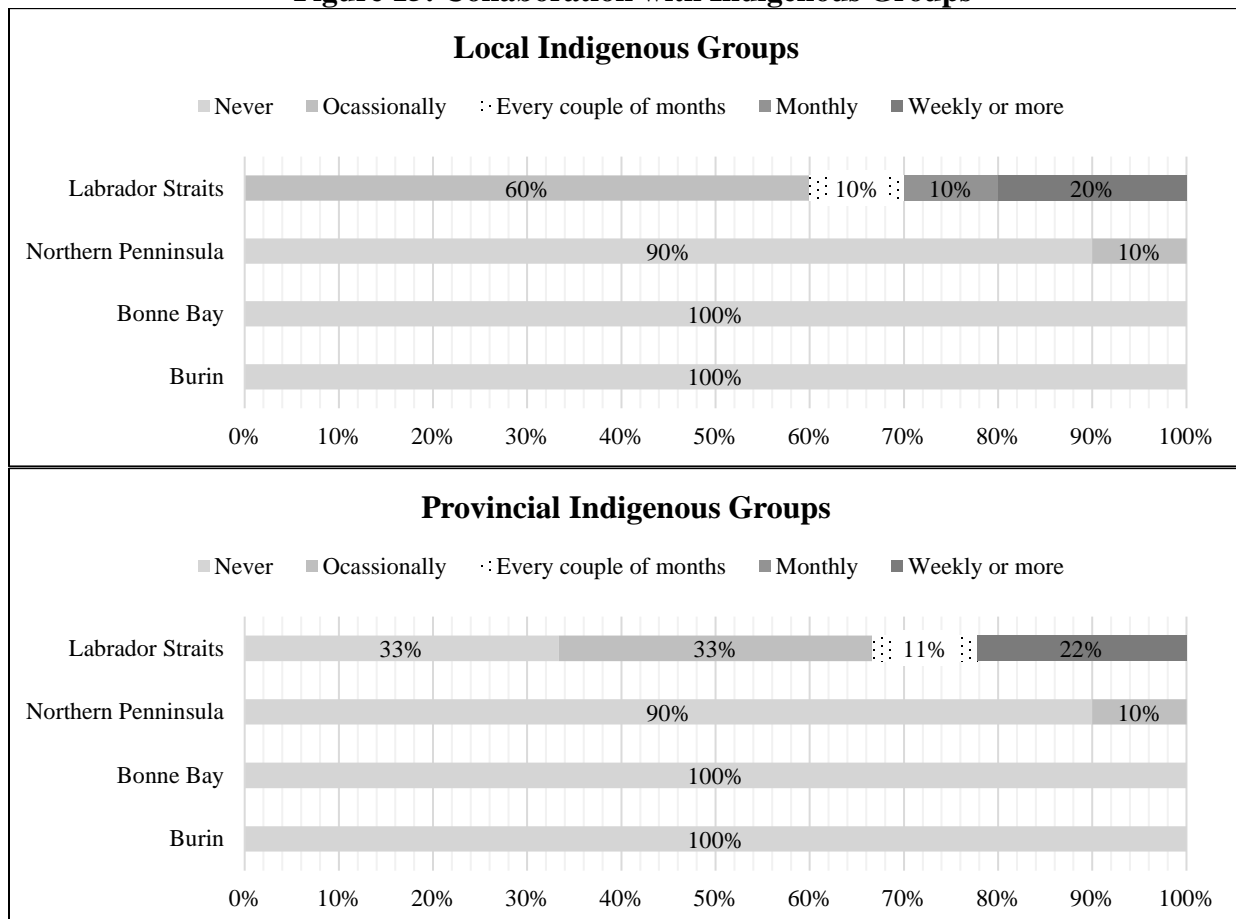
Figure 14: Collaboration with Environmental Organizations

International Environmental Organizations

Never ▪ Ocassionally ▪ Every couple of months ▪ Monthly ▪ Weekly or more

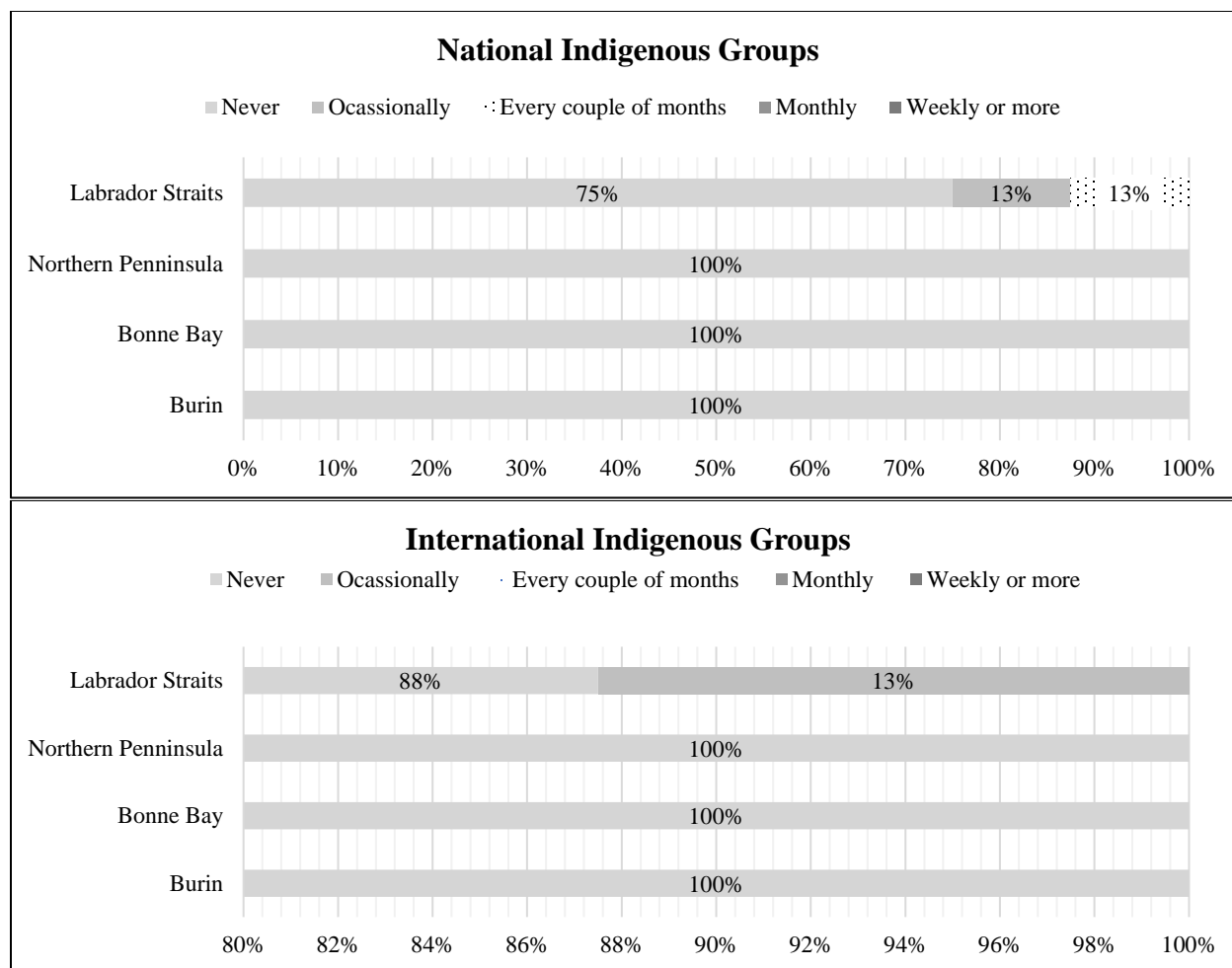| Region	Chart
Labrador Straits	30% · 20% · 30% · 20%
Northern Penninsula	60% · 40%
Bonne Bay	75% · 25%
Burin	33% · 33% · 17% · 17%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
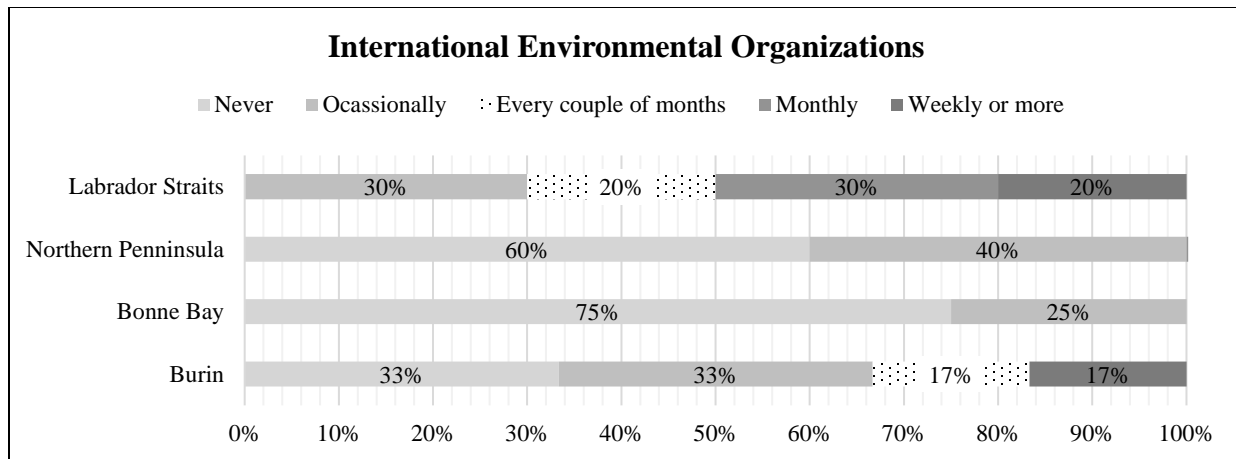
Additionally, when we look at participants' engagement with Indigenous groups, virtually all reported collaboration is in the Labrador Straits region (see Figure 15). However, in our focus group discussions, participants in the Labrador Straits and Bonne Bay noted the increasing importance of Indigenous tourism. The importance or working with Indigenous groups (in general) was noted, as was the importance of engagement specifically with Nunacor and Qalipu First Nation.

Figure 15: Collaboration with Indigenous Groups

Local Indigenous Groups

Never ▪ Ocassionally ▪ Every couple of months ▪ Monthly ▪ Weekly or more

Region	Chart
Labrador Straits	60% · 10% · 10% · 20%
Northern Penninsula	90% · 10%
Bonne Bay	100%
Burin	100%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Provincial Indigenous Groups

Never ▪ Ocassionally ▪ Every couple of months ▪ Monthly ▪ Weekly or more

Region	Chart
Labrador Straits	33% · 33% · 11% · 22%
Northern Penninsula	90% · 10%
Bonne Bay	100%
Burin	100%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

National Indigenous Groups

■Never ■Ocassionally ⋮Every couple of months ■Monthly ■Weekly or more

Labrador Straits	75% 13% 13%
Northern Penninsula	100%
Bonne Bay	100%
Burin	100%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

International Indigenous Groups

■Never ■Ocassionally ⋅Every couple of months ■Monthly ■Weekly or more

Labrador Straits	88% 13%
Northern Penninsula	100%
Bonne Bay	100%
Burin	100%

80% 82% 84% 86% 88% 90% 92% 94% 96% 98% 100%

The issue of scale is particularly important for thinking of tourism development. After all, tourism works through connecting local communities and environments to extra-local movements of people. Tourism is a prime example of an economy based on connecting the local and the global. One of the key ways in which these connections are made is through communication tools, including traditional mass media and newer forms of digital media. As such, we asked participants about their experience with online social networking tools like Facebook, Twitter, and blogs. These digital communication tools may be used for promotion to attract tourists, but can also be used to augment efforts at network building, particularly for engaging in extra-local collaboration. Overall, participants reported being quite familiar with using these tools, with roughly half (48%) indicating regular use, and an additional 34 percent reporting that they sometimes use online social networking tools (see Figure 16).

Figure 16: How familiar are you with online social networking tools? (i.e. Facebook, Twitter, Blogs)?
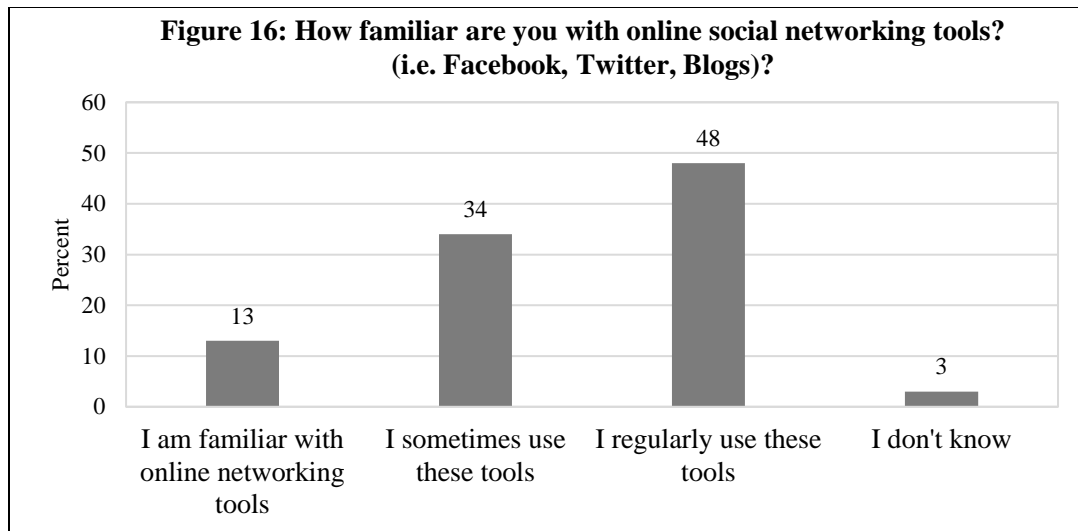

The issue of scale was also addressed in our focus group meetings. In terms of collaboration, most of the focus is on building regional collaboration and building regional tourism development initiatives, which suggests that national or international collaboration is perceived as less vital than working at the regional or provincial level. The notion of working to increase international connectivity for tourism development was less visible overall, but was raised in the Bonne Bay and Northern Peninsula discussions. One important method of doing this, which we were told about, was to tour exhibitions or performances outside of Newfoundland and Labrador as a way of building national and international awareness of local destinations. Participation in tourism tradeshows was also seen as a key way to scale up the connectivity of local communities and tourism destinations.

Digital communication tools were also discussed in our focus group meetings. Here, key themes were the need to encourage more effective use of digital tools by operators (i.e. social media, review sites like Trip Advisor), and to improve online bookability for accommodation and tourism activities, as this is an increasingly vital part of visitor planning. We also heard about the potential to better use social media as a forum for learning from successful models elsewhere

Overall, our survey data suggest that regional tourism networks are primarily local in scale and focused on relationships with tourism organizations, businesses, and government at the municipal and provincial levels. Regional comparisons of the survey suggest that the Labrador Straits and Burin Peninsula appear to have relatively more engaged tourism networks that are more likely to bridge the local, provincial, national and international scales. However, our focus group discussions challenge this finding and highlight a rich culture of collaboration in the Bonne Bay region, which also appears to be more connected nationally and internationally than the other regions. Survey responses from the Labrador Straits exhibit higher levels of collaboration with Indigenous groups than in the other study regions, though our focus group discussions show that collaboration with Indigenous groups is also valued and being pursued in the Bonne Bay region.
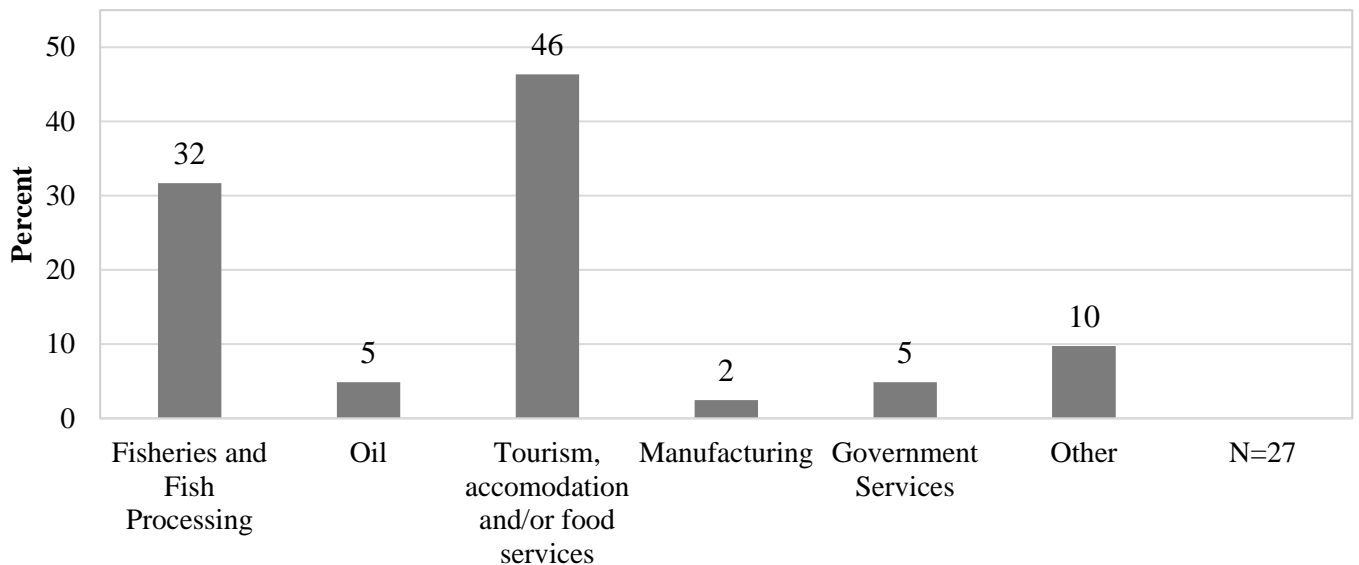
4. Envisioning the Future

In this final section, we want to explore how participants envision the future of tourism development in their region, and how they see their own roles in realizing these futures. Participants were asked what they think is "the most important industry driving the economy in your region today?" (see Figure 17). While 32 percent of participants pointed to fisheries and fish processing as an important economic driver, other extractive industries – forestry and oil – were only chosen by 3 percent of the sample. For 34 percent of participants, tourism development was the most important economic driver in their region – which is unsurprising given that survey participants are tourism operators. Only 5 percent saw government services as an important industry. For those participants who chose "other," 50 percent pointed to "hydro development, Muskrat Falls" as the prominent economic engine in their region.

Figure 17: What do you think is the most imporant industry driving the economy in your region today?
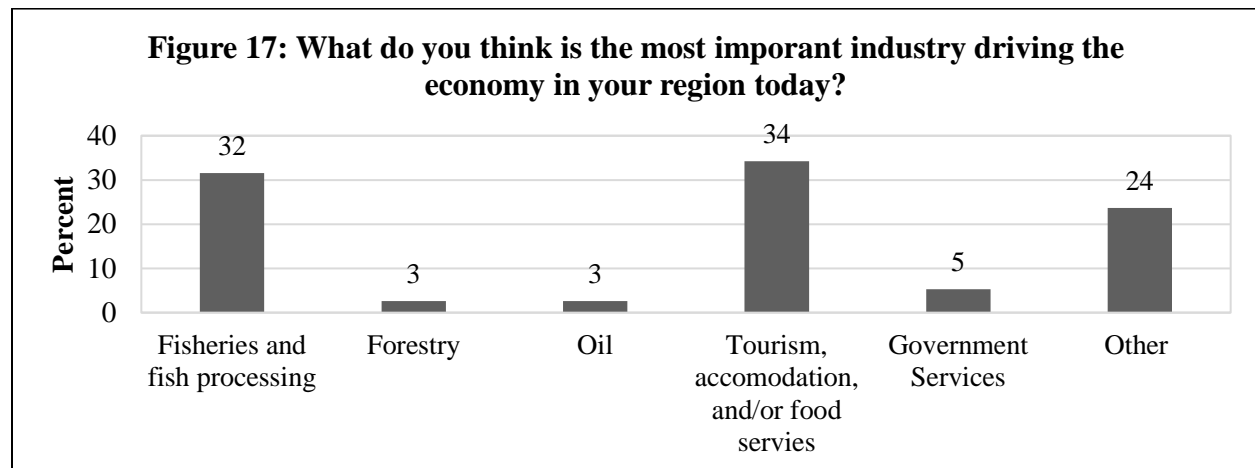
We also asked participants "what do you think will be the most important industry driving the economy in your region in ten years?" When participants thought of the future, 32 percent still saw fisheries and fish processing as the primary economic drivers in their region, however tourism and accommodation increased to 46 percent. Few participants envisioned oil (5%), manufacturing (2%), and government services (5%) as the most important regional economic drivers in the future. This is consistent with our focus group discussions, where participants generally also saw tourism as increasingly important for their regions.

Figure 18: What do you think will be the most important industry driving the economy in your region in ten years?

Percent

Category	Value
Fisheries and Fish Processing	32
Oil	5
Tourism, accomodation and/or food services	46
Manufacturing	2
Government Services	5
Other	10

N=27

We asked participants an open-ended question about what they believed should be the main areas of focus when it comes to building regional tourism networks. A summary of results is presented in Figure 19. This sociogram (network diagram) links responses (grey circular nodes) and participant region (black square nodes), with node size weighted to reflect centrality (how well the node is connected to others) and link size weighted to reflect frequency of co-occurrence.

Figure 19: When it comes to building regional tourism networks, what should be the main areas of focus?
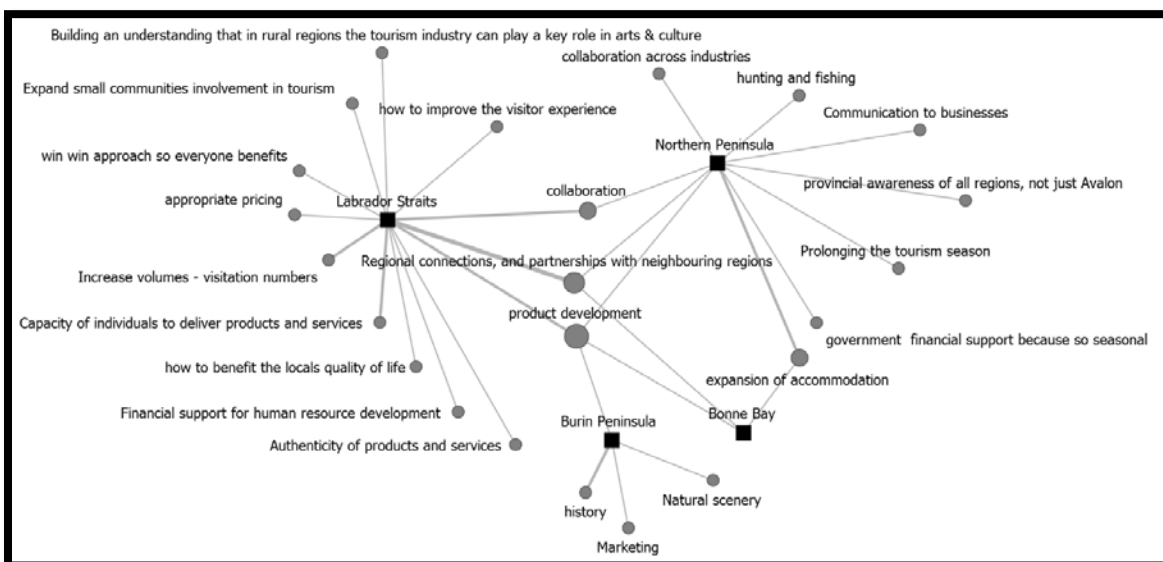
Participants from all four regions emphasized "product development" as the main area of focus for building regional tourism networks. The second most frequent theme was "regional connections, and partnerships with neighbouring regions." The focus on collaboration and cross-regional cooperation is illustrated in the following example:

> [What should be the main areas of focus?] Building inter-community cooperation and trust. Developing new projects that find new ways of preserving and presenting our unique cultural heritage, beyond recognized "key attractions." Building an understanding that in rural regions the tourism industry can play a key role in arts and culture, in the absence of established museums, art galleries, etc. that are found in urban centers.

Participants from Bonne Bay, Northern Peninsula, and Labrador Straits considered regional connections to be a key area of focus for regional tourism network building. Similarly, the general theme of "collaboration" linked participants from Northern Peninsula and Labrador Straits. One respondent identified the main area of focus as a need "to involve many industries together… fisheries with tourism and culture…bringing businesses together." This attention to togetherness was buttressed by more material concerns, as another participant wrote, the key to building regional tourism networks requires a focus on:

> Financial support for human resource development. Product development will not happen without support for individuals in the cultural sector. Nunatsiavut government has invested heavily in arts and culture with excellent results. Individuals in the cultural sector need guidance to develop tourism products and experiences. It is difficult for an artist to also be a business, but not impossible. Support for businesses providing tourism products and experiences. Guidance for the development of experiences. Real practical guidance.

Our focus group data further emphasizes the importance of regional collaboration and regional tourism development initiatives as key areas of focus. Additionally, our conversations on the Burin Peninsula identified key themes that are especially important in that region. A lack of awareness of the region among operators within the region was identified as a particular challenge for the Burin Peninsula. To address this, we were told of the need to create strategies to increase regional awareness within the tourism sector, and to build up greater regional tourism awareness among residents. Another key area of focus that came up in our focus groups, especially in the Burin Peninsula and Labrador Straits, was the need for better promotion of these areas. This was discussed with reference to provincial promotion and marketing efforts, with a sense that these regions are often at the margins or are not well-represented in provincial promotion efforts.

Another open-ended question asked participants what activities they would be most interested in doing to support tourism development. Again, a summary of results is presented in Figure 20, which visualizes connections between thematic responses (grey circular nodes) and

participant region (black square nodes), with node size weighted to reflect centrality (how well the node is connected to others) and link size weighted to reflect frequency of co-occurrence.

Figure 20: What activities would you be most interested in doing to support tourism development in the region?
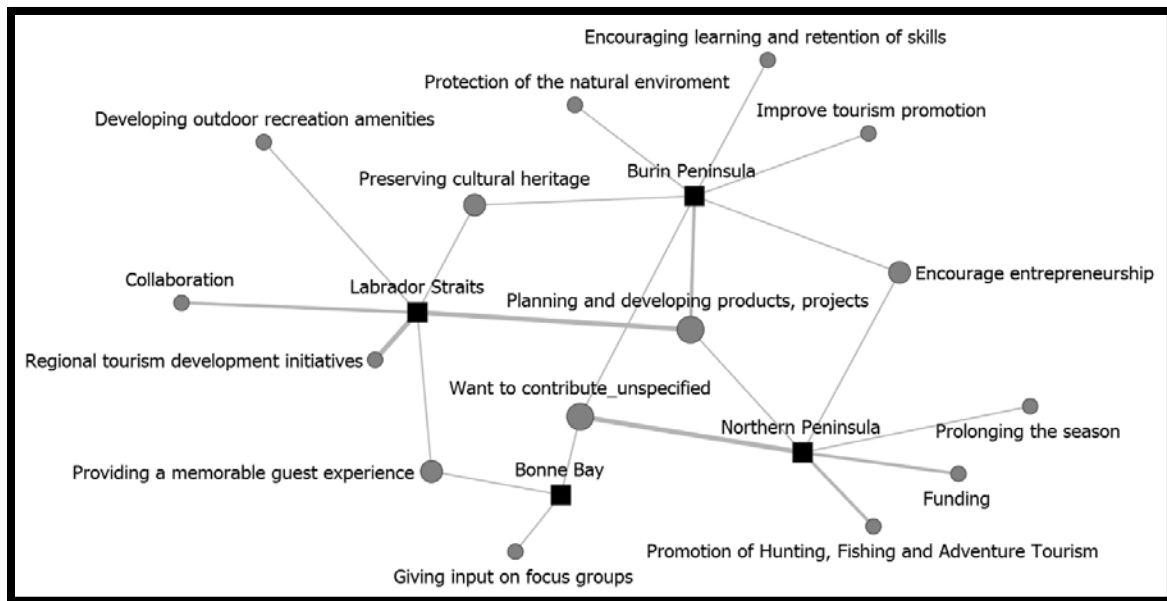
The most prominent theme is "planning and developing products and projects," followed by expressions of a general desire to contribute. As cultural and tourism workers, survey participants have plans and strategies to support tourism development in their respective regions. This desire to develop products and experiences was expanded on by participants, with one explaining that:

> I'd like to assist in the development of a high-level heritage tourism master plan for the Labrador Straits and Southeastern Labrador regions together. By "heritage tourism" I mean the interweaving of cultures, history and natural environment. Such a plan would endeavor to explore the full breadth and depth of our history (as mentioned above), and explain just what it means to live in coastal Labrador (then and now).

Once again, funding also comes up as a challenge to pursuing tourism development, with one participant just answering with the word "funding," and another who would "encourage private investors and entrepreneurs."

Overall, participants perceive of tourism development as an important economic driver, which is perceived as an industry that will gain in importance in the future. When asked what they believed should be the main areas of focus when it comes to building regional tourism networks, participants identified "product development" – the creation of services, experiences, and initiatives – along with "regional connections, and partnerships with neighbouring regions" as particularly important steps forward. Participants expressed interest in supporting regional

tourism development in a range of ways: as cultural workers, outdoor guides, and heritage guides.

Conclusion

An online survey was conducted with tourism operators from the Bonne Bay, Burin Peninsula, Labrador Straits, and Northern Peninsula regions of Newfoundland and Labrador. This final report analyzes how participants perceive the benefits of, and challenges to regional tourism network-building. As a qualification, the response rate for the survey was relatively low. In total, 34 people completed the survey, which is a 15% response rate. The response rate varies by region, however, from quite low for Bonne Bay participants (7%), to moderate for Northern Peninsula participants (22%), to reasonably high for Labrador Straits (36%) and Burin Peninsula (43%) participants. As such, our survey findings – particularly those concerning regional comparisons – should be read as more exploratory or suggestive than conclusive. However, we followed up the survey with focus groups in all four study areas, with 42 participants in total. The focus groups allowed us to augment the survey data, gain greater insight into some of the patterns we observed, and provided space for participants to push back on some of our findings and provide a more valid account of regional network building and tourism development.

In general, participants have a positive perception of the tourism sector. Participants in all four regions perceive of tourism as an economic driver capable of providing both socio-economic and intangible or social/cultural benefits to host communities. Tourism is viewed as a source of community pride, which tells important stories about local history and culture, gives visitors an appreciation of the natural environment, and contributes positively to the quality of life in host communities. When asked to identify their region's greatest asset to future regional tourism development, a common theme is the combination of two pillars of "natural environment and outdoor recreation" and "culture, heritage, and history." These findings are consistent with prior research by team members, which finds that that tourism is seen as having beneficial economic, social and culture impacts for host communities (Stoddart & Catano 2015; Stoddart & Graham 2013; Stoddart et al. 2014; Tucker et al. 2011). It is also consistent with previous findings that the "Tourism Destination Image" (Tasci et al. 2007) for Newfoundland and Labrador relies heavily on the combination of the natural environment, material culture, and intangible heritage of the province to draw visitors (Stoddart & Catano 2015; Tucker et al. 2011).

While general statements on the economic benefits of tourism received high levels of agreement, two specific measures — skills training and community embeddedness – see more variation by region and by participants' roles within the tourism sector. These findings echo conclusions from Stoddart et al.'s (2014) previous research with St. Lewis Inlet communities on the impacts of the Battle Harbour National Historic District. That project similarly found high levels of agreement with general statements about the positive social and economic benefits of tourism, but more varied opinions regarding the ability of tourism to contribute to job skills development and community embeddedness.

Our findings on social conflict and challenges for tourism development suggests that participants do not perceive conflict as a major challenge to tourism network development. However, regional comparisons indicate that participants in the Northern Peninsula perceive more frequent social conflict related to tourism development. When asked who they have conflicts with, participants most often identify municipalities and the provincial government as organizations they come into conflict with. When asked about challenges to tourism development, participants highlighted a range of human resources issues, including: the ability to hire, train, pay, and retain workers and volunteers; maintaining the capacity of volunteers and community organizations; striking a better balance between entrepreneurs, workers and volunteers in the sector; and attracting more youth to the tourism sector. Another key challenge

identified in the survey was a need for financial supports to small businesses. However, this point was more contested in the focus groups, where participants argued instead that there needs to be better use of existing resources and that a key issue is learning to better navigate the bureaucratic and legal requirements of existing programs. Infrastructure issues, including transportation and internet infrastructure, as well as accommodation capacity and quality, were also raised as key challenges. Similar issues were raised in previous research conducted by team members in the Burin Peninsula and Northern Peninsula regions, which suggests that these are persistent challenges that are shared across different regions of the province (Stoddart & Graham 2013; Tucker et al. 2011). By contrast, a challenge that is more specific to the Bonne Bay region is the need for increased tourism worker housing. This is a particular "challenge of success" that connects human resources and financial issues, and appears to be a key area for potential collaboration in this region going forward.

Previous research indicates the importance of strong regional social networks for tourism development, as these networks allow for the sharing of information and resources (Crowe 2007; Henriksen & Halkier 2009; Tucker et al. 2011). Most participants agree with the idea that individual and organizational collaboration is an important aspect of tourism development. However, regional comparisons show that participants from the Northern Peninsula seem to have somewhat less enthusiasm towards collaboration and perceive higher levels of social conflict related to tourism development. Furthermore, we note there is a "collaboration gap" between a commonly shared belief in the importance of network building and the lower levels of engagement in the ongoing practice of collaboration through tourism networks.

Our survey data suggest that collaborative tourism networks are primarily local and provincial in scale. Collaborative relationships most often involve tourism organizations, businesses, and municipal and provincial government agencies. By contrast, despite the documented potential benefits of bringing external resources such as information, skills and ideas to rural regions, there is less evidence of collaborative relationships at the national or international levels. This is consistent with previous research by team members, which similarly found that tourism networks on the Northern Peninsula tend to be predominantly local and regional, with a dense localized core but less developed network ties beyond the region (Tucker et al. 2011). Our results indicate that this is a more general characteristic of tourism networks in the province, and that connecting local and regional tourism networks to national or international scales remains relatively underdeveloped, though there is somewhat more evidence for this in our Bonne Bay focus group. Survey participants from the Labrador Straits also note relatively higher levels of collaboration with Indigenous groups than in the other regions, while focus group participants in the Labrador Straits and Bonne Bay note the ongoing and increasing importance of collaboration with Indigenous groups.

Lastly, we looked at how participants perceive the future of tourism development in their region. Forty-six percent of the sample believe that tourism will be the most important industry in their region in the next ten years, while only 32 percent perceived fishing and fish processing to be the most significant industry in their region a decade from now. These findings are similar to previous results by team members that focused on the Northern Peninsula and asked the same questions (Tucker et al. 2011). This indicates that this view of tourism as a sector currently second in importance to fisheries, but with the potential to become increasingly important in coming years, is shared across several regions of the province. Open-ended responses also provide insight into how participants may realize these futures. Participants see "product development" and "regional connections and partnerships" as main areas of focus when it comes

to ongoing tourism development. For two regions – the Burin Peninsula and Labrador Straits – increased and better representation in provincial marketing and promotion efforts was also seen as a key area of focus. When asked how they would contribute to this future, participant responses reflected a diversity of skills and interests. However, participants also reiterated the need for supports (financial resources and human resources) that could help make these aspirations a reality.

We suggest several strategies to strengthen regional tourism networks in the Bonne Bay, Burin Peninsula, Labrador Straits, and Northern Peninsula regions:

- The main tourism assets for our study regions are the combination of unique natural environments, and culture and heritage. A compelling Tourism Destination Image can continue to be developed by promoting this combination of elements. The successful cultivation of this Tourism Destination Image may be further supported by programs or initiatives that protect, enhance, and ensure the sustainability of the natural and cultural assets of our study regions. This Tourism Destination Image might also evolve to better represent emerging tourism regions, such as the Labrador Straits and Burin Peninsula.
- There is generally a high level of agreement that tourism creates positive impacts for host communities in terms of cultural, social and economic benefits. However, there is less agreement around more specific economic benefits, such as job and skills training, or using tourism employment to retain community members. Opportunities to increase the potential for ongoing skills training and mentorship through tourism would help ensure that tourism development is pursued in ways that extend the benefits for host communities. A valuable idea to emerge from our focus groups, for example, are tourism mentorship programs where employees from emerging regions could travel for hands-on experience in more established tourism operations.
- While study participants generally agree that social network-building for tourism development is important, there is a gap between the perceived significance of tourism networks, and lower levels of regular collaboration. As such, it would be valuable to increase the opportunities for tourism stakeholders to translate beliefs in the importance of network-building into practice by providing supports for new and ongoing collaboration. Tucker et al. (2011) suggest that one form of investment required is in training and support for "network weavers". Our results also show that there are currently relatively few individuals working to build connections within and especially outside their regions. Training, support and encouragement of these individuals can help to address this collaboration gap.
- Where tourism network building and collaboration is occurring, it is predominantly at the local and provincial scales, among the tourism sector and government agencies. Tourism is essentially about connecting local communities and places to broader (national and international) flows of people and potential visitors. Making these connections in an increasingly globalized world means reaching out and making connections beyond local settings to share information and resources, or learn from what others are doing well. To address these collaboration gaps, we recommend that tourism network building could be expanded "vertically" in terms of scale (i.e. more bridging with organizations at the national and international level). Tourism network building could also be expanded "horizontally" in terms of the range of sectors that are being engaged (i.e. through

increased partnerships with Indigenous groups, or environmental NGOs who have an interest in nature-based tourism).

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Appendix: Methodology

This project had two phases: an online survey followed by focus groups in each of the four study regions.
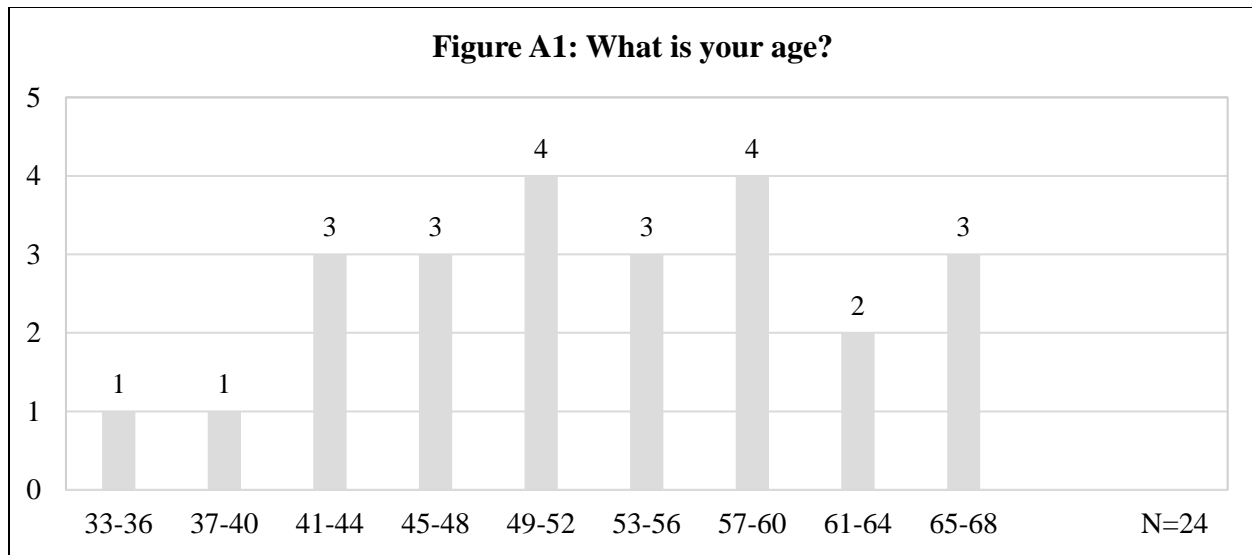
Online survey

A sampling frame of 225 tourism operators in the four study regions was assembled based on the research team`s prior work, complemented by additional web searching and consultation with our community partners. We launched the survey in September 2016, with follow-up emails sent to participants in October and November 2016. In addition, our community partners in the four study regions helped promote the survey. In total, 34 people completed the online survey, which is a 15% response rate. However, the response rates vary by region as follows: Bonne Bay (7%), Burin Peninsula (43%), Labrador Straits (36%), and Northern Peninsula (22%). The small sample size and relatively low response rate for the Bonne Bay region is a limitation of our data.

Survey questions focused on the following main areas: 1) participants' perceptions of tourism development in their region and the benefits or challenges that it creates for host communities; 2) the frequency and scope of social network construction in regional tourism development, as well as how they perceived of those collaborations, and 3) open ended questions where participants could reflect in a more unstructured way on collaborations, conflicts, assets, and challenges that are unique to their respective regions. The open-ended responses were coded and analysed using NVIVO software for qualitative analysis, and the visualizations of this data were produced using Visone software for social network analysis and visualization.

Overview of Participants

The survey asked questions about the participants themselves, including their age and gender, the region their organizations are active in, and which sectors best describes their organization. Women (54%) are slightly more represented in in our sample than men (46%). Looking at age, a clear majority of respondents fall between 41 and 68 years old with a relatively even spread for each age group within that range. A useful point for follow up would be to consider how long each participant has been working within tourism development, and examine whether Newfoundland's tourism sector is comprised of relatively new operators, or industry veterans.

Figure A1: What is your age?

| Age	Count
33-36	1
37-40	1
41-44	3
45-48	3
49-52	4
53-56	3
57-60	4
61-64	2
65-68	3

N=24

Shifting to regional participation, a majority of participants' organizations operate in the Labrador Straits and Northern Peninsula regions, with Bonne Bay and the Burin peninsula collectively making up roughly half of the sample.

Figure A2: Which of the following regions is your organization active in?

N=37

Number of Organizations
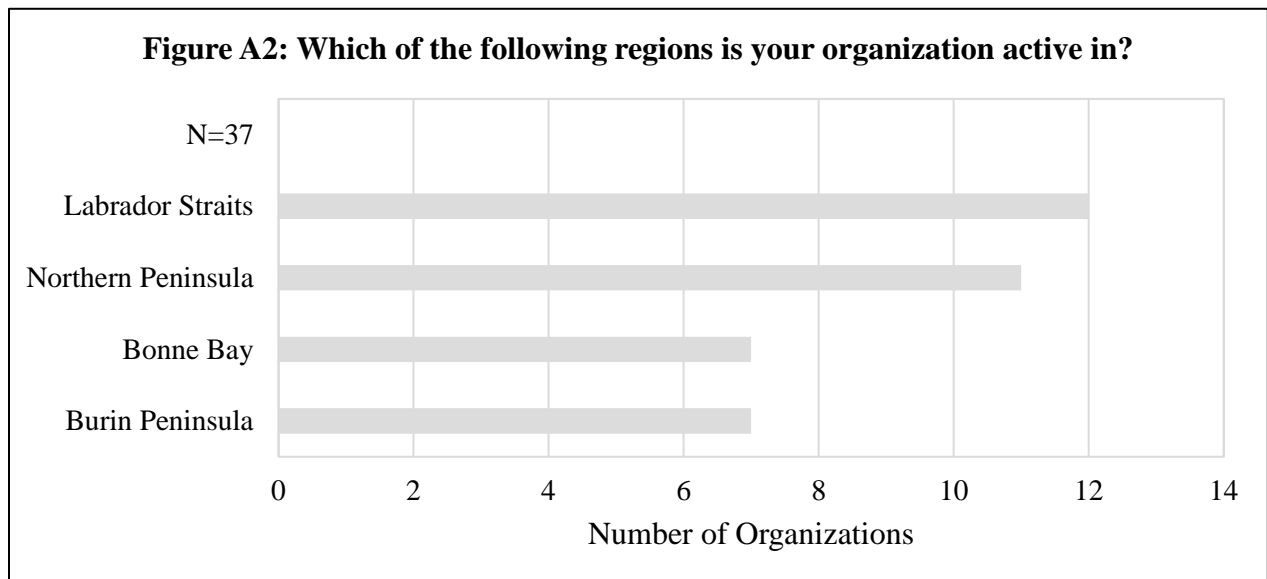
When participants were asked how to best categorize their organization, the largest proportion (41.18%) chose accommodation services. The second-most selected sector was tourism organization (24%), followed by heritage organizations (14.71%). Along with food services (3%), municipal economic development or tourism committees (2.94%), arts and culture organizations (6%), and outfitting operations (9%) comprised the smallest sectors chosen by the survey sample.

Figure A3: Which of the following categories best describes your organization?

Category	Value
Municipal Economic Development or Tourism Committee	3
Tourism Organization	24
Heritage Organization	15
Food Services	3
Arts and Culture	6
Accomodation Services	41
Guiding/ Guide Outfitting Operations	9

N=34
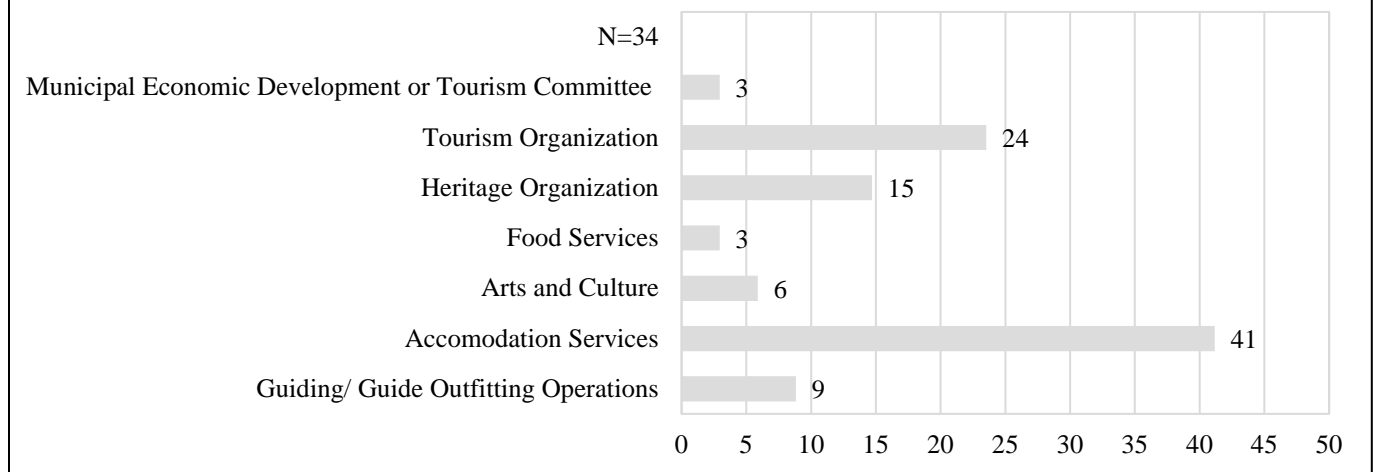
Focus Groups

The focus group phase of the project was carried out in October 2017. We conducted four meetings in Marystown, Forteau, Plum Point, and Norris Point. These focus group meetings allowed us to present the survey results and to engage in open-ended conversation about those results. We also engaged in more focused conversation about the challenges of regional tourism development. Our discussion also focused on network-building and collaboration for regional tourism development. The numbers of participants at the four workshops are as follows:

Location	Number of participants
Burin Peninsula (Marystown)	14
Labrador Straits (Forteau)	2
Northern Peninsula (Plum Point)	7
Bonne Bay (Norris Point)	19
Total	**42**

Two methodological observations about the focus group sample stand out:
- For two regions (Bonne Bay, Burin Peninsula), the focus group phase of the research drew more participants than the online survey phase of the project. By contrast, for the other two regions (Labrador Straits, Northern Peninsula), the online survey sample was larger. In total, though, the level of engagement in the project was generally higher for the focus groups than for the survey.
- The majority of focus group participants were affiliated with local or regional tourism organizations/committees or municipal or regional government offices. By contrast, the survey drew a sample more evenly balanced between private tourism operators and public/community tourism stakeholders. Furthermore, based on discussion in the focus groups, there seemed to be little overlap between survey and focus group participants.

Taken together, these differences in the survey and focus group samples underscores the importance of using multiple methods – including quantitative and qualitative research tools - to

engage a broader spectrum of participants and perspectives in research related to tourism and regional development in Newfoundland and Labrador.