

# Best Practices at World Heritage Sites: Final Report



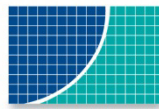
Banff National Park

Submitted to: Industry Canada

A Tourism-based comparative analysis of  
UNESCO World Heritage Sites in Canada,  
the United States and Australia



SGang Gwaay



**The Economic Planning Group** of Canada  
Tourism Consultants

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McLEOD  
SOLUTIONS

**June 2015**

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## EXECUTIVE SUMMARY

### BACKGROUND AND STUDY OBJECTIVES

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Tourism is Canada's number one service export, representing almost 2% of gross domestic product and employing hundreds of thousands of workers in rural and urban areas. Globally, tourism is growing exponentially and, while Canada has recently seen increases in international visitors, our position as a tourism destination has declined in the face of strong competition.

Attractions and destinations are key components of the tourism sector and a significant influence on travel plans and destination choice. One of the priorities of the Federal Tourism Strategy (FTS) is the promotion of product development and investments in Canadian tourism assets and products. As the lead department under the FTS, Industry Canada has been working to further the goal of strengthening the understanding of "strategically important tourism destinations and attractions" and their role in stimulating economic growth. This research project on World Heritage Sites is part of Industry Canada's work on this goal.

This study was commissioned by the Tourism Branch at Industry Canada. Its overall purpose is to complete a comparative study of World Heritage Sites (WHS) in Canada, the United States and Australia to:

- Examine the extent to which each country and surrounding communities promote, manages and leverages these assets as domestic and international tourist attractions.
- Understand the significant features that contribute to the success of World Heritage Sites as tourist attractions.
- Determine best practices with respect to tourism at World Heritage Sites.
- Identify implications for Canada arising out of the best practices.

### METHODOLOGY

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The study involved three phases of work and a combination of primary and secondary research.

The three phases were:

- Phase One: Initial overview of the key characteristics of all World Heritage Sites in Canada, Australia and the United States and recommendations for eight case study sites.
- Phase Two: The case studies and identification of success factors.
- Phase Three: Determination of best practices and implications for Canada

The research methodology relied primarily on secondary research, reviewing material compiled from a variety of sources. It was complemented in Phase 2 by interviews with site management and stakeholders for each of the case studies.

## CASE STUDY WORLD HERITAGE SITES

Eight World Heritage Sites were selected for case studies. They are:

- Gros Morne National Park, Canada
- Wood Buffalo National Park, Canada
- Head-Smashed-In Buffalo Jump, Canada
- Purnululu National Park, Australia
- Kakadu National Park, Australia
- Willandra Lakes Region, Australia
- Mesa Verde National Park, United States
- Hawai'i Volcanoes National Park, United States

Findings from the case study research led to a series of best practices regarding ways to more fully leverage the tourism potential of World Heritage Sites, and thereby create increased economic activity.

## BEST PRACTICES

The analysis of the factors of success around tourism at World Heritage Sites showed that:

1. The international significance of the protected heritage values of World Heritage Sites is at the core of their appeal to audiences. The protection of these values is central to their long-term sustainability and success.
2. The best practices may be grouped into five interconnected and interdependent categories:
  - Vision and Collaboration
  - The Visitor
  - The Product
  - The Destination Area, and
  - Marketing



3. The five categories operate as a system in support of preserving and fostering connection with the Outstanding Universal Value of the World Heritage Site, as illustrated in the graphic.

The best practices identified from the research and organized under these five categories are:

### **Vision and Collaboration**

- Maximizing available funds for capital projects and operations.
- Having an overall vision and the leadership to implement it.
- Collaborating with Friends associations, communities and other non-profit local organizations.
- Involving the private sector in delivering services and programs.
- Co-operating with Aboriginal stakeholders to enhance the tourism offer.

### **The Visitor**

- Collecting statistics and survey data on current visitors.
- Understanding demographic and market trends and what they mean for the World Heritage Site.
- Identifying target markets and their needs and expectations.

### **The Product**

- Offering a choice and diversity of experiences targeted to visitor interests.
- Involving Aboriginal peoples and/or local hosts in the development and delivery of programs and services.
- Having up-to-date, well-maintained visitor infrastructure.

### **The Destination Area**

- Having a critical mass of experiences and amenities in the destination area.
- Having good transportation access with options.
- Providing wayfinding and, as appropriate, internal transportation networks.

### **Marketing**

- Having a strong brand that communicates the positioning and benefits to target markets.
- Using the World Heritage Site brand in marketing to create profile and attract visitors.
- Having a strong and consistent profile in destination marketing, including iconic images to capture attention.
- Having detailed, easy-to-use trip planning information on-line.
- Having a strong and engaging social media presence.

# CHAPTER 1: INTRODUCTION

## 1.1 BACKGROUND

In 2014, tourism activities represented almost 2% (\$34.4 billion) of gross domestic product and employed hundreds of thousands of workers in rural and urban areas across the country. It is Canada's number one service export with revenues of domestic and international visitors exceeding \$88.5 billion. In the last three years, international travel to Canada has been growing. Overall, international visitors in 2014 were up 2.9% over 2013.

Attractions and destinations are key components of the tourism sector and a significant influence on travel plans and destination choice. Industry Canada is the lead department under the Federal Tourism Strategy (FTS). One of the priorities of the FTS is the promotion of product development and investments in Canadian tourism assets and products. In this context, it is important to strengthen the understanding of "strategically important tourism destinations and attractions" and their role in stimulating economic growth.

Industry Canada's efforts have included a literature review on strategically important tourism destinations and attractions (InterVISTAS Consulting, 2012) and a Forum of the FTS Steering Committee, provincial and territorial representatives and industry stakeholders on the same topic (2013). As a follow-up initiative, they commissioned this research project focused on World Heritage Sites as tourism destinations.

## 1.2 STUDY PURPOSE AND OBJECTIVES

This study was commissioned by the Tourism Branch at Industry Canada. Its overall purpose is to complete a comparative study of World Heritage Sites (WHS) in Canada, the United States and Australia to:

- Examine the extent to which each country and surrounding communities promote, manages and leverages these assets as domestic and international tourist attractions.
- Understand the significant features that contribute to the success of World Heritage Sites as tourist attractions.
- Determine best practices with respect to tourism at World Heritage Sites.
- Identify implications for Canada arising out of the best practices.

## 1.3 ORGANIZATION OF THIS REPORT

This report is presented in five chapters along with several appendices.

Chapter 1 provides contextual information on World Heritage Sites and their role in tourism and describes the research methodology. Chapter 2 provides an overview of World Heritage Sites in the three countries and the



methodology for selecting eight sites as case studies for this project. Chapter 3 provides key findings from the case study research including a comparative analysis of these sites.

Chapter 4 presents the best practices with respect to tourism at World Heritage Sites as identified during the case study research. Chapter 5 explores implications for the tourism potential of Canada's World Heritage Sites arising out of the identified best practices. Several appendices provide supplemental information and a list of acronyms as well as a bibliography.

A separate background document contains the detailed case study findings along with more information on all of the World Heritage Sites in Canada, Australia and the United States.

## **1.4 WORLD HERITAGE SITES AND TOURISM**

### **BACKGROUND ON THE DESIGNATION AND ROLE OF WORLD HERITAGE SITES**

When the World Heritage Convention was adopted by UNESCO more than forty years ago to create a World Heritage list, the main goal was to develop an "instrument of international cooperation to identify, protect, present and transmit to future generations the world's outstanding natural and heritage sites". Tourism and attracting visitors were not major considerations at that time. Since then, global tourism has exploded and many World Heritage Sites have become significant tourism attractions, generating economic and social impacts for the destinations in which they are located. However, there have often been negative impacts from increased visitation and it has, at some sites, posed challenges with respect to protecting their natural and cultural integrity. Since the mid-1990s, some nations have been motivated by socio-economic factors to seek inscription on the World Heritage list, usually focused around the economic benefits of tourism. More recent nominations are required to include tourism considerations in their submissions for inscription on the World Heritage list.

Some destinations and agencies promote and profile their World Heritage Sites extensively, using them as a "hook" to attract visitors to their country/state/region. Others are less concerned with visitation levels, recognizing the negative impacts that more visitors could have on the site. Generally, the challenge is one of balance – protecting the integrity of the resource and managing visitation so as to optimize the mutual benefits.

The focus of this assignment is on identifying best practices from a tourism and economic impact perspective. While acknowledging the critical importance of managing tourism and visitation to minimize and mitigate negative impacts on the natural and cultural values of a site, we have not addressed approaches for doing this.

It is also important to recognize that World Heritage Sites are, by their very nature, "world class". They have been inscribed on the World Heritage list by UNESCO for their unique and authentic natural and/or cultural resources. Often, it is these very features that are the 'demand generator' – the motivation – for people to visit. Other experiences at the site or in the destination area help to broaden the appeal, lengthen stays and spending and possibly extend the operating season. Given the unique nature of World Heritage Sites, the findings of this study may, therefore, not necessarily apply to all tourist attractions, particularly not to those lacking unique or outstanding features.

## IMPACTS AND BENEFITS OF THE WORLD HERITAGE SITE DESIGNATION

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Our literature review identified many studies on the subject of World Heritage Sites around the world. Several that we reviewed looked specifically at the benefits of World Heritage Site status and some of their findings are interesting in the context of our work.

One study<sup>1</sup> investigated the costs and benefits of World Heritage Site status, looking at 17 World Heritage Sites throughout the United Kingdom. The study concluded that comparing costs was difficult due to the differences in the sizes, ownership, nature and location of the sites. However, they did identify eight benefit areas along with their beneficiaries. These were:

- Partnership – benefitting local residents and visitors indirectly through improved management;
- Additional Funding – benefitting the site itself;
- Conservation – benefitting the local residents and visitors who enjoy enhanced conservation, as well as the wider population given the long term preservation of the sites;
- Tourism – benefiting local tourism businesses due to increased visitor spending;
- Regeneration – benefitting local residents and businesses due to increase levels of economic activity;
- Civic Pride – benefitting local residents who enjoy increased confidence in the area and improved quality of life;
- Social Capital – benefitting local populations and organizations by creating opportunities for interaction and engagement;
- Education and learning – benefitting visiting educational groups.

A second study<sup>2</sup> looked at seven World Heritage Sites from around the world, seeking recommendations that would help maximise the social, economic and environmental benefits for UNESCO designated sites in Scotland. They identified four key benefits that accrued to many of the sites:

- Enhanced leverage to pull in funding for a wide range of purposes
- Stimulus to awareness raising and educational initiatives
- Enhanced tourism image and profile
- Enhanced opportunities for niche branding of local products and services

They concluded that the benefits appeared to be enhanced in cases where there was substantial community buy-in. They also determined that the actual impact of a new site would depend very largely on these three factors:

- Existing geography – a remote site with a small local population and a finite tourism market will have limited social and economic benefits.
- The system of governance – a system offering only limited and formal involvement to the local population will have a minimal impact on community capacity.

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<sup>1</sup> PriceWaterhouseCoopers, The Costs and Benefits of World Heritage Site Status in the UK Department of Media, Culture and Sport, 2007

<sup>2</sup> Hambrey Consulting, Social, Economic and Environmental Benefits of World Heritage Sites, Biosphere Reserves and Geoparks, 2007

- Local leadership – where confident site management leverages power with strong local business and community leaders, economic and social impacts may be more significant.

Another study<sup>3</sup> was designed to identify best practices at World Heritage Sites that succeeded at converting socio-economic “opportunity from designation into advantage”. They looked at all World Heritage Sites and conducted 14 specific case studies.

The author contended that *"sites that have achieved significant impacts have had a clear logic chain from the identification of the issues and problems they wished to address, a clear understanding of how World Heritage Site status could be used to catalyse change, following through to investing in the resources, activities and processes to deliver the impacts desired."* The author agreed with a previous study (World Heritage for the Nation: Identifying, Protecting and Promoting our World Heritage, 2008) that stated the *"benefits that the sites attribute to WHS status are therefore strongly related to the motives they had for bidding and correspondingly what they have used the status for."*

The author concluded that for a significant number of sites being designated a World Heritage Site, a collective question arises amongst local stakeholders, “Why is our place unique, special and globally important?” He claimed it is this question that forms the basis of effective tourism marketing. For those who have answered the question, they become part of a group which seeks to focus the economic development of a place on its uniqueness, authenticity, distinct sense of place, and depth of identity and culture. *"They use the added stimulus of World Heritage Site status to engage with the rest of the world from a position of confidence selling distinct products and services at added value based upon their provenance."* The fact that a site has been designated a World Heritage Site automatically bestows on it the mantle of authentic, unique and world class.

## 1.5 APPROACH TO THE STUDY

This study involved three phases of work and a combination of primary and secondary research.

### THREE PHASES OF WORK

The three phases were:

- Phase One: Initial overview of the key characteristics of all World Heritage Sites in Canada, Australia and the United States and recommendations for eight case study sites.
- Phase Two: The case studies and identification of success factors.
- Phase Three: Determination of best practices and implications for Canada

### RESEARCH METHODOLOGY

The research methodology relied primarily on secondary research, reviewing material compiled from a variety of sources. It was complemented in Phase 2 by interviews with site management and stakeholders for each of the case studies. The research was qualitative not quantitative since it was based on a case study approach.

<sup>3</sup> Rebanks Consulting and Trends Business Research Ltd. Research and Analysis of the Socio-Economic Impact Potential of UNESCO World Heritage Site Status: UK Lake District World Heritage Project, 2009

Specific research tasks included:

- Web-based research to compile basic information on all World Heritage Sites in Canada, Australia and the United States for Phase One. For the case studies, additional web research sourced more detailed information and reports and also provided insights into how the various sites are marketed. As well, we reviewed tourism websites on the destination areas surrounding each site.
- Review of research reports, visitor surveys and research, statistical reports, management plans, and economic impact studies related to the selected Case Study World Heritage Sites, along with reports from state/provincial and national parks and tourism agencies.
- For the case studies, interviews were sought with 2 – 4 key stakeholders associated with each site. Target interviewees were:
  - Site manager or senior management person;
  - Senior representative of key partnership organization(s), where such organizations existed;
  - Senior representative of the regional and/or state/provincial tourism marketing agencies.
- Interviews with senior Parks Canada managers, External Relations and Visitor Experience branch.

# CHAPTER 2: WORLD HERITAGE SITES IN CANADA, AUSTRALIA AND THE UNITED STATES

This chapter provides an overview of the World Heritage Sites in Canada, Australia and the United States and then focuses on the case studies – first, how the eight sites were selected and some key information on each, then a comparative analysis of these sites.

## 2.1 OVERVIEW

Together, the three countries have 58 World Heritage Sites as summarized in Table 1. Over half the sites are natural sites; Australia and the US have some mixed sites, but Canada does not. Most sites are in rural locations; each country has a few World Heritage Sites in urban locations and a few remote sites<sup>4</sup>.

In all three countries, the federal governments have a major role in the ownership and management of World Heritage Sites. State/provincial governments are also heavily involved, particularly in Australia. Other organizations such as not-for-profit and Aboriginal community groups are involved to varying degrees in all three countries, but not generally as the primary site owner/manager.

**Table 1**  
**World Heritage Sites in Canada, Australia and the United States**

	Canada	Australia	United States
<b>Total WHS Sites</b>	17	19	22
Cultural Sites	8	3	9
Natural Sites	9	12	12
Mixed	0	4	1
<b>Sites by Location</b>			
Urban	2	3	4
Rural	11	8	17 (1 partly remote)
Rural (accessible by road) but Remote	2	3	0
Remote (not accessible by road)	2	5	1
<b>Major Ownership/Management</b> (sometimes these are joint roles)			
Federal Government	12	9	18
State/Provincial Government	6	14	4
Other (NFP, First Nation, Municipality, etc.)	7	5	3

<sup>4</sup> Remote sites are those not accessible by road. A separate category is those rural sites that are accessible by road but are hundreds of kilometres from the nearest significant community.

Appendix II provides summary information on each of the World Heritage Sites in the three countries including:

- Year of inscription
- Type of site
- Location (rural, urban, remote, rural/remote)
- Major activities
- Ownership and management
- Attendance and visitor origins (note that this information is limited in some cases)
- Whether it is within 200km of a major city
- Whether there are other significant attractions nearby

Some key findings<sup>5</sup>:

- Visitation levels vary significantly, from fewer than 1,000 at remote sites to 3 – 5 million at iconic sites such as Canada's Rocky Mountain Parks, the Statue of Liberty and Grand Canyon.
- Sites within 200km of major cities tend to have higher visitation levels, but this is not always the case.
- Visitation at Canadian sites (other than Québec City and the Rocky Mountain Parks) tends to be at the lower end of the range, with many sites under 200,000 visitors. On the other hand, visitation to the US sites is at the higher end of the range, not surprising given the much higher resident populations and tourist visitation levels. One remote US site, part of the Kluane/Wrangell-St. Elias/Glacier Bay/Tatshenshini-Alsek gets some 500,000 visitors – due to shore excursions from cruise ships.
- Most of the Canadian sites are highly seasonal, essentially closing down in the winter. Many Australian sites are also very seasonal due to inaccessible roads and areas during the wet seasons.
- Australian sites see a broad range of visitation. Interestingly, some of the more remote sites (e.g. Great Barrier Reef, Uluru-Kata-Tjuta) have relatively high visitation numbers.
- The most prevalent activities at the natural sites are, of course, outdoor recreation such as hiking, wildlife viewing and observing the unique features that are key factors in World Heritage Site inscription. Many of the sites have Interpretive or Discovery centres of some kind. At the cultural sites, viewing built heritage or iconic architecture or First Nations/Indigenous people cultural experiences are most common.

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<sup>5</sup> Data is from various sources used in compiling information on the World Heritage Sites. Visitation data was sourced from websites and reports of the government departments with responsibility for management of the site. Appendix II provides information on the visitation to each of these sites and also identifies the site managers.

## 2.2 SELECTION OF EIGHT WORLD HERITAGE SITES FOR THE CASE STUDIES

A methodology was established to select the eight case study sites. It followed four steps:

### 1. ELIMINATE A NUMBER OF SITES FROM CONSIDERATION FOR A RANGE OF REASONS

On reviewing information on the World Heritage Sites in all three countries (see Appendix II), it became evident that there were a number of sites that would not be good selections for the case studies for a variety of reasons. The rationale for eliminating these sites is described below; the sites eliminated from consideration are listed in Appendix III. Note that some sites were eliminated for more than one reason.

#### *Sites that have only recently been designated as World Heritage Sites:*

These sites are either still getting established from a management perspective or are expected to have little information on the types of best practices we are looking for. All sites inscribed on the World Heritage list in 2010 or later were eliminated for this reason.

#### *Sites that are not publicly accessible or get no visitors:*

Sites that are only accessible for research purposes or that are extremely remote have very few visitors and low potential as tourism destinations.

#### *Sites that are very different or unusual:*

These sites are each generally unique attractions and have little comparison to anything available in Canada. World Heritage Sites with multiple locations where it would be difficult to isolate best practices were also included in this list.

#### *Sites with National or International Iconic Status:*

These are sites that have been internationally established tourism icons for many years and where the WHS inscription has probably had less of an impact. It is likely that these sites will always attract large visitor numbers and we have concluded that best practices of relevance to Canadian tourism products are likely limited.

#### *Sites that are incorporated in another destination or cover a broad area:*

With these sites, it would be very difficult to isolate practices and impacts associated with the World Heritage Site from those associated with the destination as a whole; as well some of these sites do not have a market presence that is separate from the entire destination.

Twenty-two sites were eliminated from consideration for the case studies.

### 2. SELECT SOME REMOTE SITES

Remote sites were defined as those only accessible through fly-in services, boat or foot or by road but requiring hundreds of kilometres of travel through largely unpopulated areas.

The remote sites appeal to a very limited market, have generally low visitation levels and are in areas of small populations. As a result, their tourism and economic impacts are much more limited. However, Canada has a number of such sites and they have increasing appeal to some markets, particularly international tourists. It was

therefore decided to include two remote sites, one in Canada (Wood Buffalo National Park) and one in Australia (Purnululu National Park).

### **3. SELECT THE CANADIAN SITES BASED ON SEVERAL CRITERIA**

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The other Canadian case studies were the first to be selected, according to the following criteria:

- Relative contribution of the site to tourism at the destination and the economy of the region
- Role of the community (defined broadly to include residents, First Nations, not-for-profit groups, private sector) in site management and delivery of visitor services.
- Responsiveness to market trends.
- Visitation factors including overall trend and importance of tourism visitors
- Natural vs cultural sites
- Geographic location within Canada
- National vs provincial involvement in ownership/management.

The outcome was two Canadian sites – Gros Morne National Park in Newfoundland and Labrador and Head-Smashed-in Buffalo Jump in Alberta.

### **4. SELECT AUSTRALIAN AND UNITED STATES SITES THAT HAVE SOME COMPARABILITY TO THE CANADIAN SITES**

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While World Heritage Sites are by nature unique, the review of all other Australian and United States sites focused on selecting a mix of natural and cultural sites that had some comparability to the selected Canadian sites. The outcome was two Australian sites (Kakadu National Park and Willandra Lakes Region) and two United States sites (Hawai'i Volcanoes National Park and Mesa Verde National Park).



## 2.3 THE EIGHT CASE STUDY WORLD HERITAGE SITES

The eight World Heritage Sites selected for the case studies are listed in Table 2 along with some basic information on each.

<b>Table 2</b> <b>The Eight Case Study World Heritage Sites</b>				
<b>Country &amp; Site</b>	<b>Type of Site, Year of Inscription</b>	<b>Location</b>	<b>Ownership/ Management</b>	<b>Reason for WHS Inscription</b>
<b>CANADA</b>				
Gros Morne National Park Newfoundland and Labrador	Natural, 1987	Rural	Parks Canada	Geological landforms – inland fiords and tablelands
Head-Smashed-In Buffalo Jump Alberta	Cultural, 1981	Rural	Province of Alberta	Archaeological site – buffalo jump embedded in landscape
Wood Buffalo National Park Alberta/Northwest Territories	Natural, 1983	Rural, but Remote	Parks Canada	Boreal landscape and inland delta with bison and whooping cranes
<b>AUSTRALIA</b>				
Purnululu National Park Western Australia	Natural, 2003	Rural but Remote	Western Australia (State) in collaboration with Indigenous traditional landowners	Geological landforms – sandstone range
Willandra Lakes Region New South Wales	Natural/ Cultural, 1981	Rural	New South Wales and traditional tribal groups. Mostly private landowners.	Sand formations; prehistoric archaeological sites
Kakadu National Park Northern Territory	Natural/Cultural, 1981	Rural	Co-managed by Australian Federal Government and Indigenous traditional landowners	Indigenous rock art; bioregion landscapes with multiple and diverse species
<b>UNITED STATES</b>				
Mesa Verde National Park Colorado	Cultural, 1978	Rural	US National Parks Service	Archaeological site – Native American cliff dwellings embedded in landscape
Hawai'i Volcanoes National Park Big Island, Hawaii	Natural, 1987	Rural	US National Parks Service	Geological landforms - volcanoes

# CHAPTER 3: INSIGHTS FROM THE CASE STUDIES

This chapter first provides an overview of each of the case study sites. It goes on to provide a comparative analysis of the sites, focussing on similarities and differences around a series of topics.

## 3.1 OVERVIEW OF THE CASE STUDY WORLD HERITAGE SITES

### GROS MORNE NATIONAL PARK, CANADA

Located in western Newfoundland & Labrador, some 35 km north of Deer Lake Airport, Gros Morne National Park (GMNP) is an area of dramatic natural beauty – mountains, fiords, ocean coastline and bays, plateaus, forests, barrens and wetlands, tablelands and internationally significant geological features. Eight small communities share boundaries with the Park and provide visitor services and infrastructure. Visitors can experience outdoor adventure – hiking, kayaking, wildlife viewing, boat tours, camping and sightseeing, visit two visitor/interpretive centres, several heritage sites and participate in a range of guided and self-guided learning experiences, all within the Park boundaries. An extensive offering of culture and entertainment, festivals and visitor amenities are found in the adjoining communities. The park is operated by Parks Canada.



Gros Morne National Park is an icon for Newfoundland and Labrador tourism. Arguably, it has played a key role in the growth in tourism in the province over the past 15 years. Visitation<sup>6</sup> to the site has increased steadily, reaching 193,000 in 2013/14 and the region attracts a significant proportion of all visitors to the province, particularly those from the US and overseas.

### HEAD-SMASHED-IN BUFFALO JUMP, CANADA

Head-Smashed-In Buffalo Jump (HSIBJ) is an aboriginal, archaeological site located in the Porcupine Hills in southwest Alberta, 180 km from Calgary. The site comprises 4,000 hectares of rolling grassland segmented by an immense sandstone cliff, below which buffalo and cultural remains are buried



<sup>6</sup> Parks Canada, Parks Canada Attendance: 2009-10 – 2013-14.

10-metres deep. A multi-level Interpretive centre recessed into the bluff provides exhibits and interpretive information, a café and gift shop, while walking trails afford some limited exploration of the landscape. First Nations interpreters provide tours, animated programs, performances and guided hikes.

The site, which is managed by the Alberta Department of Culture and tourism, receives visitation averaging around 60,000<sup>7</sup> annually, about half of which is out-of-province tourists.

### WOOD BUFFALO NATIONAL PARK, CANADA

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Wood Buffalo National Park (WBNP) is the largest national park in Canada. Located on the plains of north-east Alberta and southern Northwest Territories, the park is 750 km from Yellowknife. Fort Smith (population 2,500) provides the closest services, including air access. The 4.48 million hectares encompasses the world's largest inland delta, at the mouth of the Peace and Athabasca Rivers. The site is managed by Parks Canada.



Photo Credit: Parks Canada; John McKinnon

WBNP sustains North America's largest population of wild bison and is a natural nesting place for the threatened whooping crane. It is also a Dark Sky Preserve, with outstanding views of the Aurora Borealis. The “park supports and protects many unique natural and cultural resources, from diverse ecosystems and rare species to the traditional activities of Aboriginal residents”<sup>8</sup>.

The Park offers outdoor activities – hiking, camping, canoeing, fishing and boating as well as opportunities to see the bison, whooping crane and many other species of birds and mammals.

Annual visitation<sup>9</sup> has been in the 1,300 – 2,000 range over the past five years.

### PURNULULU NATIONAL PARK, AUSTRALIA

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Located in Western Australia, 300km south of Kununurra (population 4500), Purnululu National Park (PNP) features striking geological formations called Bungle Bungle surrounded by outstanding outback scenery. Reached by a 52 km dirt road off the main highway, it is a star attraction of the region and in recent years has one of the iconic destinations of Australia, featured prominently in state and national tourism marketing campaigns,



Source: Tourism Australia Website

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<sup>7</sup> Head-Smashed-in-Buffalo Jump site management.

<sup>8</sup> Parks Canada, <http://www.pc.gc.ca/eng/pn-np/nt/woodbuffalo/natcul.aspx>

<sup>9</sup> Parks Canada, Parks Canada Attendance: 2009-10 – 2013-14; interviews with site management

despite only being “discovered” in 1983.

Since independent visitation requires 4WD vehicles and a degree of self-sufficiency, private tour operators play an important role in providing transportation services, lodging and guiding. The park is open during the dry season only (April to November), but a large portion of its territory is closed off to the public year round. Purnululu is owned and operated by the Western Australia Department of Parks and Wildlife.

The core activity is viewing the unique Bungle Bungles formations on hikes and from the air. Several day hiking trails in the park lead to very photogenic viewpoints overlooking the iconic beehive-like formations. Observing flora and fauna (particularly 130+ bird species) specific to the area is another activity along with bushwalking and overnight backpacking.

Visitation to the site has increased steadily in the past 20 years, but has stalled recently. Just under 26,000<sup>10</sup> people visited the site in 2013/14, a significant portion international visitors who are clients of the private operators in the park.

## **WILLANDRA LAKES REGION, AUSTRALIA**

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The Willandra Lakes Region World Heritage Site is located in the far western region of New South Wales. The site includes the dry lakebeds of seven former lakes and is rich in fossils and globally important early homo sapien findings. At its heart is Mungo National Park, a place of great significance to Indigenous tribes and site of the archaeological finds of Mungo Man and Mungo Woman, the world’s oldest human cremations. Mungo National Park is owned and operated by the New South Wales government and is the only area with visitor experiences within the World Heritage Site Region. The balance of the World Heritage Site is privately owned (primarily used for sheep grazing) and has no visitor facilities. Willandra Lakes Region is accessible by car. The nearest communities with an airport are about 110 km away.



High winds and erosion in the area form rare large sand and clay shapes and dunes; one of the most imposing, and a core visitor attraction, is known as the ‘Walls of China’.

The area holds great significance to three traditional tribal groups who are closely involved in the site under a ground-breaking management agreement developed in the mid-1990s. Private businesses, including aboriginal businesses, provide guided experiences.

Annual visitation to Mungo National Park is around 35,000<sup>11</sup> and has declined in the past decade.

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<sup>10</sup> Purnululu National Park site manager.

<sup>11</sup> Email correspondence with Rod Trowbridge, Chief Executive Officer, Mildura Tourism, May 2015



## KAKADU NATIONAL PARK, AUSTRALIA

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Kakadu is the largest terrestrial park in Australia and is known for both natural and cultural landscapes. It is one of six national parks managed by Parks Australia. Situated in the Top End of the Northern Territory, the Park receives about 220,000 visitors<sup>12</sup> annually and is jointly-managed with Indigenous peoples who own and lease the land to Parks Australia.

At the intersection of four bioregions, the Park encompasses a diverse landscape stretching from ocean to sandstone plateaus that includes floodplain, savannah, rainforest and woodland environments. It is recognized for a rich and diverse environment, possessing one-third of bird fauna and one-quarter of mammal fauna in Australia, 1,600 plant species and the most freshwater fish species in Australia. It is home to Aboriginal people with a culture dating back thousands of years and who still live and work on land now within the Park.

Kakadu National Park is the major attraction in the northern region and is marketed to international tourists by Tourism Australia as an iconic destination. It is a four-hour drive from Darwin, the main population centre and airport.



## MESA VERDE NATIONAL PARK, UNITED STATES

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Mesa Verde National Park is home to the ruins of ancient Pueblo villages representing some of the best-preserved cliff dwellings in the world. Created in 1906, this archaeological preserve of almost 5,000 archaeological sites and 600 cliff dwellings is the largest in the United States. Operated by the US National Parks Service, the site occupies 81.4 square miles in Colorado in the Four Corners region where four states intersect and where desert meets the Rockies with elevations over 7,000 feet.

Visitors are able to explore a variety of cliff dwellings dating from 600 to 1300 AD and learn about the Ancestral Puebloan culture from Park rangers and some Native American tour guides. The Park can be explored by car, bicycle or on foot. The Park also provides hiking trails. Cultural programs are offered through the Museums Association. It receives about a half million visitors annually<sup>13</sup>.



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<sup>12</sup> <http://www.environment.gov.au/topics/national-parks>

<sup>13</sup> National Park Service Visitor Use Statistics ([www.irma.nps.gov/Stats/Reports/Park?MEVE](http://www.irma.nps.gov/Stats/Reports/Park?MEVE))

## HAWAI'I VOLCANOES NATIONAL PARK, UNITED STATES

Hawai'i Volcanoes National Park (HVNP) is located on Hawai'i Island, the largest of Hawaii's islands, and is some 150 km from the main airport and tourist destination area, Kailua-Kona. It includes two active volcanoes: Kilauea Volcano 'the world's only drive-in volcano' and Mauna Loa Volcano and is home to a diversity of plant communities and vegetation types, with landscapes ranging from tropical rainforests to scrub areas. It is also a sacred place for the Hawaiian people. HVNP is operated by the US National Parks Service.

Visitors can see, hear, smell and taste the volcanic activity which is particularly spectacular at night. The Park offers extensive hiking opportunities with miles of trails ranging from short strolls through deserts and rainforest to back-country treks over rugged lava plains. There is a privately operated hotel within the park.

Visitation to the site was almost 1.7 million<sup>14</sup> in 2014, up 37% since 2009, a more significant increase than the 28% increase in visitation to the State overall. Visitation jumps when one of the volcanoes is active.



### 3.2 COMPARATIVE ANALYSIS OF THE CASE STUDY WORLD HERITAGE SITES

Tables 3 through 7 provide a comparative analysis of the eight case study World Heritage Sites looking at some of their similarities and differences. The tables are structured as follows. For additional details on the sites, please refer to Appendix IV.

Table 3: Location and Setting

- Location/Access
- Destination Area
- Seasonality

Table 5: Visitor Profile

- Attendance
- Visitor profile
- Market & visitor research

Table 7: Marketing

- World Heritage Site brand/positioning
- Marketing
- Social media

Table 4: Visitor Experience

- Why visit
- Visitor offer
- Length of stay

Table 6: Community Involvement

- Role of non-profit 'Friends'
- Role of Aboriginal groups
- Role of private sector

<sup>14</sup> National Park Service Visitor Use Statistics ([www.irma.nps.gov/Stats/Reports](http://www.irma.nps.gov/Stats/Reports))

<b>Table 3</b> <b>Case Studies Summary: Location and Setting</b>			
<b>Site</b>	<b>Location / Access</b>	<b>Destination Area</b>	<b>Seasonality</b>
<b>Gros Morne National Park Canada</b>	West coast of Newfoundland, 35 km from Deer Lake airport.	Eight town sites in or adjacent to the Park offer a diversity of cultural attractions, dining & lodging. Gros Morne NP is the primary regional attraction.	Seasonal but with strong shoulder season. Many facilities closed in off-season.
<b>Hawai'i Volcanoes National Park</b>	Hawai'i (Big) Island is the largest of the Hawai'i islands. Site is 3-hour drive from airport and main centre.	Big Island is one of the main Hawaii destinations. Limited facilities at the Park but some services available in nearby community. Most visitors drive out for the day from the coast. Significant congestion can occur driving to and at the volcano. The Park is the primary attraction.	Visitation is evenly distributed year-round.
<b>Kakadu National Park</b>	Top End of Australia outback, 4-hour drive from Darwin and international airport.	The Park is immense with three distinct visitor nodes set far apart and includes a town site, all offering dining & lodging. Kakadu NP is the primary regional attraction.	Dry season is the best time to visit; access limited during rainy season. International visitors tend to arrive during the rainy, low season (coincides with northern winter).
<b>Head-Smashed-In Buffalo Jump World Heritage Site</b>	Southwestern Alberta, 3-hour drive from Calgary and international airport.	The site is reasonably compact. No major attractions nearby; limited lodging in Fort Macleod 18 km away. HSIBJ is a secondary attraction in the region.	Seasonal. Interpretive Centre is open by appointment during winter, e.g. for school groups.
<b>Mesa Verde National Park</b>	Southwestern Colorado at Four Corners, a popular tour destination. Site is a one-hour drive from nearby towns	Limited lodging & dining on site, but many services outside Park gates and in region. Many attractions in region, including Grand Canyon.	Seasonal. Facilities and roads closed in winter.
<b>Wood Buffalo National Park</b>	Remote location. Border of Alberta and NWT, 750 km from Yellowknife. Local airport at Fort Smith. Main access is by air.	The Park is immense but only a little is accessible. Fort Smith near Park entrance offers some lodging and dining, as well as a visitor centre; also Fort Chipewyan. Park is not the primary regional attraction.	Seasonal (summer) but visitor centre open year-round.
<b>Purnululu National Park</b>	Remote location. Western Australia outback 1150 km from Darwin; requires 52 km drive in 4WD.	No nearby town or attractions. It is a primary destination in region. Some lodging/dining outside Park.	Seasonal. Roads are closed during rainy season.
<b>Willandra Lakes Region/Mungo National Park</b>	Relatively remote location. New South Wales outback, 110 km from main airport.	Is a primary destination in region; no nearby town or attractions. Lodging and other services adjacent to park.	Seasonal. Roads are closed during rainy season.

## LOCATION AND SETTING: CASE STUDIES FINDINGS

### SIMILARITIES

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- All of the sites are in rural locations and two are very remote.
- Private tour operators offer transportation to all sites except Wood Buffalo National Park. This is a new service at Head-Smashed-In Buffalo Jump being introduced in 2015.
- With the exception of Hawai'i Volcanoes National Park, all of the sites have seasonal visitation with limited access and closed facilities during the off-season.

### DIFFERENCES

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- In contrast to the other Case Study sites, Wood Buffalo and Purnululu National Parks have remote locations difficult to reach, with more limited visitor amenities and range of activities.
- Willandra Lakes Region, which is also relatively remote, contains a National Park (Mungo) within its borders and all visitor activities and amenities are located within this park. There are no visitor activities in the rest of the Region.
- Because of it is easily accessed by road, the volcano at Hawai'i Volcanoes National Park is a main attraction for visitors to Hawaii, particularly when the volcano is active, netting it very high visitation.



<b>Table 4</b> <b>Case Studies Summary - Visitor Experience</b>			
<b>Site</b>	<b>Why Visit</b>	<b>Visitor Offer</b>	<b>Length of Stay</b>
<b>Gros Morne National Park</b>	Experience unique landscapes. Participate in cultural events and festivals in a scenic location.	Several discrete visitor nodes offer a broad array of activities: scenic driving, hiking, boating, water-based activities; lighthouse tours, music, theatre, storytelling and literary events, exhibits, camping. Lodging/dining available.	Visitors average 3.6 days.
<b>Hawai'i Volcanoes National Park</b>	Experience an active volcano. Explore varied landscapes.	Drive to the volcano. Hike, with a ranger or self-guided. Cultural and learning programs, exhibits. Limited on-site lodging/dining.	Most visitors make a day visit.
<b>Kakadu National Park</b>	Explore rock art. Interact with indigenous people. Experience diverse wildlife and landscapes.	Drive, hike, boat, fish, swim. Cultural programs and tours. Many options for lodging/dining.	Visitors average a 2.8 day visit.
<b>Head-Smashed-In Buffalo Jump World Heritage Site</b>	Visit interpretive centre. Interact with First Nations people. Walk landscape.	Tour museum exhibits; learning and cultural programs; hike. On-site café; no accommodation.	Visitors spend on average a half-day.
<b>Mesa Verde National Park</b>	Explore Native American cliff dwellings.	Drive, hike, cycle. Tour exhibits, learning programs. Limited on-site lodging/dining.	Most visitors spend a half-day on site.
<b>Wood Buffalo National Park</b>	See bison herds in the boreal wilderness. The only whooping crane nesting area in world (not currently accessible to visitors).	Outdoor adventure: Drive, boat, paddle, fish. Experience Dark Sky. Visitor centre in Fort Smith at Park entrance. Camping available in Park; all lodging/dining is in Fort Smith.	Most visitors spend less than a day; about one-third camp overnight.
<b>Purnululu National Park</b>	Outdoor adventure in the "last frontier" of the Bungle Bungle sandstone range. Interact with indigenous peoples.	Outdoor adventure: Hike, heli-tour, camp, overnight bushwalks; High-end lodging. Many do fly-over tours without landing in Park. High-end eco-tourism lodging in Park.	Most visitors stay overnight.
<b>Willandra Lakes Region / Mungo National Park</b>	Outdoor adventure focused on sand dunes across dry lake bed. Interact with indigenous peoples.	Outdoor adventure: Hike, mountain bike, camp. Activities limited to Mungo NP area.	Most visitors stay overnight.

## VISITOR EXPERIENCE – CASE STUDIES FINDINGS

### SIMILARITIES

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- All sites offer a combination of guided and self-guided experiences.
- All sites offer something truly unique and authentic.
- All of the sites offer overnight accommodation or camping, except Head-Smashed-In Buffalo Jump.

### DIFFERENCES

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- Although Gros Morne National Park is designated a World Heritage Site for natural values, the destination area offers a strong and varied cultural program, which broadens and diversifies the visitor experiences.
- Head-Smashed-In Buffalo Jump is the only site with a strictly cultural offer, featuring a museum-style learning experience with First Nations cultural interactions; recreation is limited.
- The US National Parks Service limits the range of accommodation/dining options in Parks on the basis that its core business is conservation and education, not hospitality.
- The three more remote sites (Wood Buffalo National Park, Willandra Lakes Region and Purnululu National Park) are difficult to access and appeal to those seeking wilderness adventure experiences.
- The average length of visit varies from a half-day to almost four days. It is affected by the availability of overnight accommodation and the range and nature of activities.

**Table 5**  
**Case Studies Summary - Visitor Profile**

<b>Site</b>	<b>Attendance</b>	<b>Visitor profile</b>	<b>Market &amp; Visitor Research</b>
<b>Gros Morne National Park</b>	2014- 190,000+ Trend is upward. Highest visitation in region.	Three-quarters are visitors to NFLD; 22% international; 81% first-time.	Regular visitor demographic and satisfaction surveys; postal codes are collected and used to analyse visitor preferences; Explorer Quotient segmentation is applied; economic impact estimated in 2009 at \$37.6 million CDN
<b>Hawai'i Volcanoes National Park</b>	2014 – 1.7 million; upward trend – peaks when volcano active; is growing in step with Island visitation. Visitation even throughout year.	Two-thirds are from mainland US; popular shore excursion for cruise ships.	Limited research – rely on Big Island DMO for info; economic impact estimated in 2014 at \$137 million US.
<b>Kakadu National Park</b>	2013 – 200,000; downward trend, attributed to declining international visitors to Aust.	About 50/50 Australian/international; Park attracts a younger demographic than to region in general; about 40% visit with commercial tour operators.	Last major survey in 2000-01; economic impact estimated in 2007 at \$15 million AU; the site targets 'Experience seekers' per Tourism Australia's market segmentation
<b>Head-Smashed-In Buffalo Jump World Heritage Site</b>	2014 – 56,000; stabilizing trend (down from 85,000 in 2003), but not maintaining market share compared to other heritage attractions.	Half from outside Alberta (compared to the region which attracts 90% in-province); 73% first-time.	Last visitor survey in 2008; economic impact estimated at \$3.5 million CDN in 2008; postal codes captured; now applying Explorer Quotient segmentation used by Tourism Alberta.
<b>Mesa Verde National Park</b>	2014 – 500,000; stable trend though down from earlier years.	80% US visitors; more international in shoulder season; 75% first-time.	Visitation and accommodation usage are tracked monthly; no recent surveys; economic impact estimated in 2014 at \$50 million US.
<b>Wood Buffalo National Park</b>	2014 – 1,300; down from 2,000 in 2013 (forest fires in 2014)	78% CDN visitors from western Canada; 79% first-time.	Last visitor survey in 2011; do not collect postal codes (visitation too small) but do employ Explorer Quotient segmentation; no economic data.
<b>Purnululu National Park</b>	2014 – about 26,000; stable trend (up from 17,000 in 1992)	About 50/50 Australian/international; most visit with commercial tour operators; receives about 10% of visitors to the region.	Very limited research
<b>Willandra Lakes Region / Mungo National Park</b>	2014 – about 35,000; downward trend	Mostly Australian visitors – about 5% international.	Very limited research

## VISITOR PROFILE – CASE STUDIES FINDINGS

### SIMILARITIES

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- The vast majority of visitors are first-time visitors and most are from outside the region.
- Coming up with accurate and consistent visitor counts is a challenge for the sites.
- Visitation to the site tends to be affected by tourism to the region in general.

### DIFFERENCES

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- Visitation ranges from under 2,000 to over 1.7 million.
- Visitor origins vary from country to country, as illustrated in Table 5.
- While all sites do some visitor research, the nature and frequency varies greatly.
- The Canadian sites and the federally managed Australian site (Kakadu) undertake more visitor and market research than the US sites or the state-managed Australian sites, and have adopted innovative segmentation strategies as a means of understanding visitors and developing experiences (e.g. EQ) to help drive audience growth.
- The US sites are located in popular tourism regions with large volumes of visitors and/or are easily accessed by large population bases, resulting in much higher visitation for both Hawai'i Volcanoes and Mesa Verde National Parks than for the Canadian or Australian sites.
- Relative to the number of domestic visitors, the US sites appear to have proportionately fewer international visitors than either the Canadian or Australian sites, which may be a function of the time of year the visitor surveys were undertaken or of the generally much larger American population.
- The only site to be open and have evenly distributed visitation year-round is Hawai'i Volcanoes National Park.

<b>Table 6</b> <b>Case Studies Summary - Community Involvement</b>			
<b>Site</b>	<b>Role of non-profit 'Friends' and Volunteers</b>	<b>Role of Aboriginal Groups</b>	<b>Role of Private Sector</b>
<b>Gros Morne National Park</b>	Cooperating 'Friends' association runs gift shops and cultural programs, involving volunteers.	No appreciable involvement	Private outfitters operate boat tours and guided adventures.
<b>Hawai'i Volcanoes National Park</b>	'Friends' association operates book stores and publishing program; volunteer program exists for conservation work.	A sacred site; ongoing consultation, formal and informal, with the Native Hawaiian people.	A third party operates the on-site lodging/dining facility.
<b>Kakadu National Park</b>	Short-term commercial voluntourism opportunities are made available.	Co-own and co-manage the Park; deliver cultural programs	The Park actively solicits private operators to provide guided experiences, lodging & dining.
<b>Head-Smashed-In Buffalo Jump World Heritage Site</b>	Not-for-profit association operates visitor services and gift shop. No volunteers.	Hired as staff and to deliver cultural programs.	The on-site café is leased to a third-party operator.
<b>Mesa Verde National Park</b>	'Friends' association operates book stores and publishing program; volunteer program exists for conservation work.	Some staff hiring. Legislated consultations with local band councils concerning the protection of cultural resources.	A third party operates the on-site lodging/dining facility.
<b>Wood Buffalo National Park</b>	Some local volunteers for special events.	Co-operative management plan with 11 First Nations is currently being developed.	One private outfitter offers wilderness experiences.
<b>Purnululu National Park</b>	None apparent.	Collaborate in Park management, are on staff and offer guided experiences.	Provide tours and lodging/dining as well as transportation.  The Park solicits private operators to participate and invest.
<b>Willandra Lakes Region / Mungo National Park</b>	None apparent.	Deliver cultural programs.	Provide a small number of guided experiences.

## COMMUNITY INVOLVEMENT – CASE STUDIES FINDINGS

### SIMILARITIES

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- Sites are all publicly owned.
- Sites are all operated by national or provincial/state park agencies.
- Accessing sufficient funds for capital and operating costs is a challenge.
- Sites struggle to balance visitor needs with operational constraints.
- Sites have management plans, though not all are current.
- All sites have some formal arrangements with the private sector, though the degree and nature of the relationship varies.
- Where appropriate, sites involve indigenous people in program delivery.

### DIFFERENCES

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- US sites have access to funds from the National Parks Service Foundation.
- US sites have a set formula for retaining earned revenue.
- Gros Morne has Principles for Engaging Communities; also very strong and successful Cooperating Association.
- US, and particularly Australian sites, are more pro-actively involved with the private sector.
- The Australian park administrations actively solicit private tour operators to own and operate tours and lodging/dining services in the Parks, subject to licensing.
- The US National Parks Service contracts out the operation of Park-owned lodge/dining facilities and delivery of adventure tours.
- Both US and Canadian sites benefit from the active involvement of non-profit friends associations who invest the revenue generated from educational and cultural programs back into the site.
- Australian park authorities regard local aboriginal groups as traditional landowners and either officially co-manage or actively collaborate with these aboriginal groups on park management.
- The US and Canadian sites hire local aboriginal staff for cultural program delivery and other roles, as appropriate, but do not involve aboriginal groups in co-management (though Wood Buffalo is in the process of developing a co-operative management plan.)
- The National Parks Service consults local aboriginal groups only in regard to the conservation of protected cultural resources, as required by law.

**Table 7**  
**Case Studies Summary - Marketing**

<b>Site</b>	<b>World Heritage Site Brand/ Positioning</b>	<b>Marketing</b>	<b>Social Media</b>
<b>Gros Morne National Park</b>	WHA status is promoted in marketing materials	It is a provincial icon with very high profile in N&L Tourism. Parks Canada, the regional DMO and Gros Morne Cooperating Association also promote.	Active on social media channels operated by a third party site, vistigrosmorne.com. No links on Parks Canada website to social media channels.
<b>Hawai'i Volcanoes National Park</b>	WHS is not prominent in marketing.	NPS does not market but DMO does – is a key feature that distinguishes the Big Island from rest of Hawaii.	Very active on social media with daily posts and visitor engagement.
<b>Kakadu National Park</b>	WHS is prominent in marketing materials.	Is actively promoted by Tourism Australia to international visitors as an iconic destination. Is the icon for Northern Territory tourism. Developed a Brand Strategy in 2008 and Tourism Plan in 2009.	Active on social-media channels, managed by Parks Australia.
<b>Head-Smashed-In Buffalo Jump World Heritage Site</b>	Incorporates WHS into its name and promotes in marketing materials.	Has low profile in Tourism Alberta; is a Destination Canada Signature Experience for aboriginal experiences; regional DMO promotes it as a destination on 'circle' drive tours.	Posts on Facebook every few days; low Twitter followers.
<b>Mesa Verde National Park</b>	WHS is not prominent in marketing.	NPS does not market but regional DMO does, as does the Friends association and private-sector lodging provider.	Has many Facebook followers, posting every few days; account managed by the NPS.
<b>Wood Buffalo National Park</b>	WHS status is promoted in marketing materials.	Parks Canada undertakes some awareness promotion; has a limited profile in both NWT Tourism and Tourism Alberta.	Very limited social media presence.
<b>Purnululu National Park</b>	WHS used in all marketing materials	Western Australia and federal tourism bodies promote to international visitors; branded as iconic remote Australian destination.	Facebook and Twitter for all Western Australia Parks, nothing specific for Purnululu
<b>Willandra Lakes Region / Mungo National Park</b>	WHS is identified on website and in the limited marketing materials.	Limited marketing and little profile from state/federal tourism bodies; website has good trip-planning info and downloadable park guide.	Facebook page for all New South Wales parks, nothing specific to Willandra or Mungo NP.

## MARKETING – CASE STUDIES FINDINGS

### SIMILARITIES

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- Lead agencies undertake limited marketing – awareness, website, media and public relations.
- Sites rely on national/provincial/regional DMOs for marketing.
- All sites have websites with trip planning information.
- All are involved with social media, to varying degrees.
- The travel trade advertises organized trips to each of the sites; however, the more accessible the site, the more numerous and diverse the tour packages.

### DIFFERENCES

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- Only one site (Kakadu) has undertaken a site-specific brand strategy.
- Two sites (Kakadu, Gros Morne) are very involved in destination area tourism, and have produced long term tourism plans.
- Several of the sites (Kakadu, Purnululu, Gros Morne, Hawai'i) benefit from high-level marketing efforts by provincial/state DMOs and as a result have become primary drivers of regional tourism activity.
- Only the Canadian sites and one Australian site (Kakadu) highlight the World Heritage Site brand.
- Parks Canada is the only agency not to post links to social media channels on its website.
- Hawai'i Volcanoes National Park is by far the most active on social media.



# CHAPTER 4: BEST PRACTICES FOR TOURISM AT WORLD HERITAGE SITES

## 4.1 INTRODUCTION

In analysing the factors of success around tourism at World Heritage Sites, three points became clearly evident:

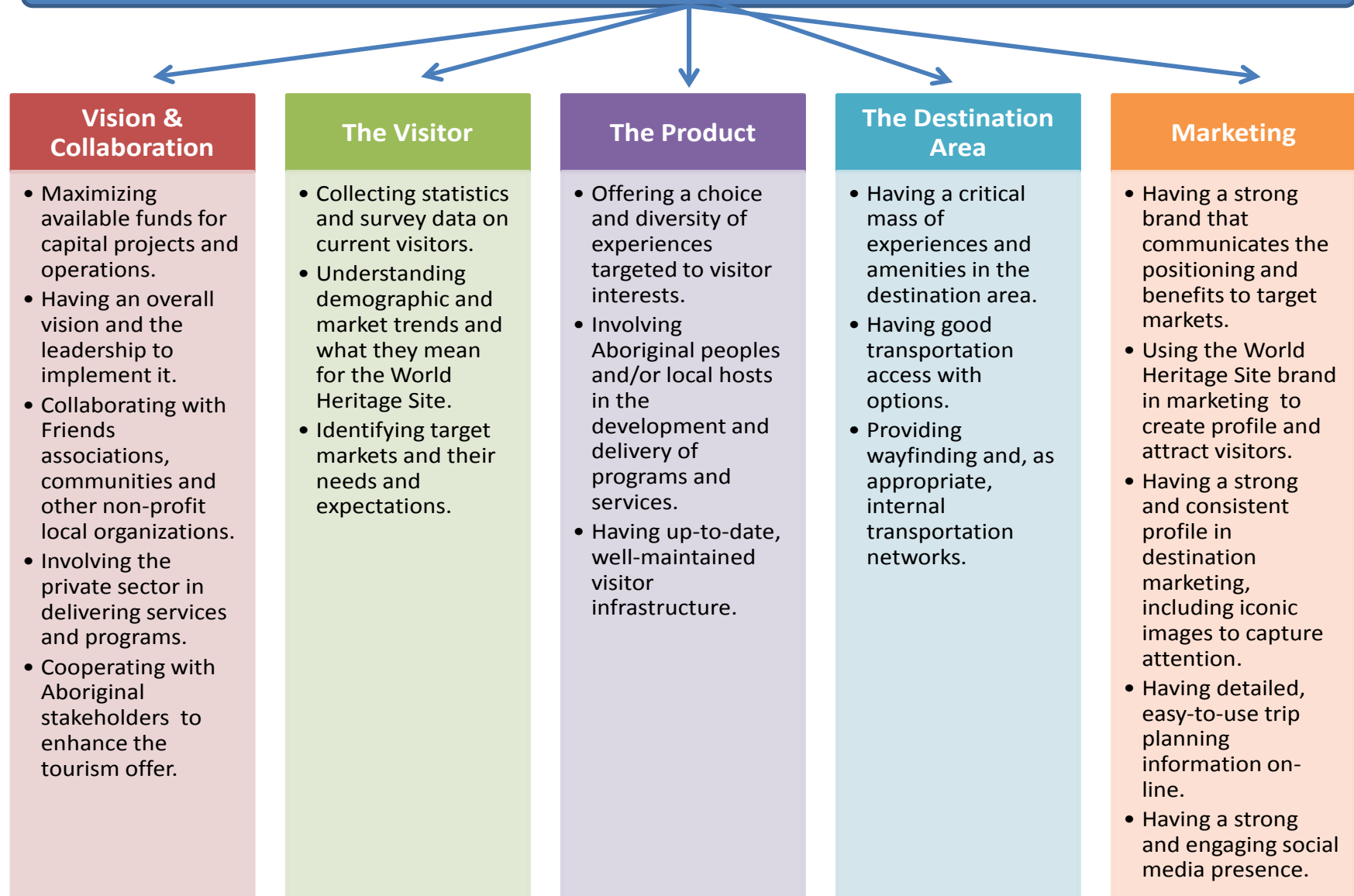
1. The international significance of the protected heritage values World Heritage Sites is at the core of their appeal to audiences. The protection of these values is central to their long-term sustainability and success.
2. The best practices may be grouped into five interconnected and interdependent categories:
  - Vision and Collaboration
  - The Visitor
  - The Product
  - The Destination Area, and
  - Marketing
3. The five categories operate as a system in support of preserving and fostering connection with the Outstanding Universal Value of the World Heritage Site, as illustrated in the graphic.



The focus of the best practices is on ways to more fully leverage the tourism potential of World Heritage Sites, thereby creating increased economic activity.

Under each of these headings, there are a number of best practices. They are summarized in the chart on the next page and then discussed, together with examples and illustrations selected from the case studies.

## World Heritage Sites: Outstanding Universal Value



## 4.2 VISION AND COLLABORATION

For World Heritage Sites, having a vision is the foundation for management plans and strategies. Without one it is difficult to set goals and move forward in a cohesive and deliberate manner. While the support of tourism and economic activity is a motivation for seeking inscription, the vision for a World Heritage Site needs to balance this objective with the imperative to protect the outstanding universal natural and/or cultural values of the special place. The case study World Heritage Sites that have developed a formal vision did so collaboratively with stakeholders – landowners, communities, government, aboriginal peoples and scientists as well as site owners and managers.

At World Heritage Sites where tourism and economic development are key motivations, it is also important to have an overall vision for tourism in the destination area. These visions recognize that successfully developing an international tourism destination takes staying power over a long time, and attention to a wide range of issues. Again, these tourism visions have been developed collaboratively with communities, the private sector and other stakeholders.

Collaboration at all levels becomes crucial to achieving these visions. Where they have been successful, government agencies at different levels have been on-side with policies, regulations, funding programs and strategies, and communities (in the broadest sense) have fully embraced tourism and its implications.

At its most fundamental, achieving a vision is about having enough money and the right people to get the job done.

### 4.2.1 MAXIMIZING AVAILABLE FUNDS FOR CAPITAL PROJECTS AND OPERATIONS.

Most World Heritage Sites (including all but one of the case studies for this research) are owned and/or managed by government at either the federal/national or state/provincial level. With increasing pressures on the public purse over the last twenty years, core funding levels have declined. Aging infrastructure and increasing operating costs combined with higher visitation levels and a more demanding customer mean that sites are frequently challenged to keep up with what needs to be done.

### BEST PRACTICES: VISION AND COLLABORATION

4.2.1 Maximizing available funds for capital projects and operations.

4.2.2 Having an overall vision and the leadership to implement it.

4.2.3 Collaborating with Friends associations, communities and other non-profit local organizations.

4.2.4 Involving the private sector in delivering services and programs.

4.2.5 Cooperating with Aboriginal stakeholders to enhance the tourism offer.

Opportunities to maximize the funds available for capital projects and operations vary from site to site and by jurisdiction. Hawai'i Volcanoes National Park utilizes a variety of methods to maximize funding, as described in the illustration.

Generally, practices for maximizing funding or containing costs include:

- Increasing revenue earned (and retained) on-site. This can be problematic given government policies around setting prices and retaining revenue. Common approaches that have been used within World Heritage Sites include:
  - Have a 'Friends' organization that operates revenue-generating services (e.g. gift shop, food service) with monies earned being used for special projects.
  - Contract with the private sector or non-profit groups to deliver services.
- Using 'Friends' organizations to raise money from other sources (other government agencies, donations, sponsorships and other kinds of fundraising) that is then used for capital or operating projects.
- Using volunteers to deliver services and programs.
- Sourcing money directly through Foundations, such as the National Parks Foundation in the US.
- Contracting with the private sector to build and/or operate visitor infrastructure.
- Direct allocation of funds in light of World Heritage Site inscription - In Australia, the federal government provides some limited annual funding (AU \$250,000) to World Heritage Sites.

### Illustration:

#### Hawai'i Volcanoes National Park, US

Like many government-run agencies, Hawai'i Volcanoes National Park is allocated core funding from the federal government but it is not sufficient for their capital and operating needs. The Park works to maximize the funds it has available through a variety of means:

- Applying for project-specific grants through the US National Parks Foundation – the official Charity of the US National Parks. In 2013, the Foundation raised \$23 million in support of US National Parks and invested \$16 million in grants among dozens of parks, programs and Friends groups.
- The Park retains 80% of its earned revenue on-site with the balance going to a general National Parks Service fund that helps support parks with no fees. Site admission fees (the primary source for earned revenues) are regulated nationally but a recent policy decision to gradually increase fees over several years will provide significant additional funds.
- The Friends of Hawai'i Volcanoes National Park fundraises, accesses government grants and earns program fees to support park initiatives. One of these is an annual \$500,000 Park Ranger Youth Internship Program. This organization also coordinates 40 – 50,000 hours per year of volunteer time which is invaluable to the Park.
- The Park can also apply for project funds through other government agencies.

#### Findings from the Case Studies:

- ***Gros Morne National Park & Hawai'i Volcanoes National Park have 'Friends' organizations that operate services on-site, with the funds generated used for special projects.***

- *Mesa Verde National Park, Hawai'i Volcanoes National Park, Gros Morne National Park, Purnululu National Park, Kakadu National Park & Head-Smashed-in Buffalo Jump all have private or not-for-profit organizations involved in delivering services to varying degrees.*
- *Hawai'i Volcanoes National Park, Mesa Verde National Park and Gros Morne National Park have 'Friends' organizations that raise money from various sources for projects, and/or coordinate volunteer help for initiatives.*
- *Purnululu National Park has contracted with the private sector to build and operate accommodation infrastructure.*

#### 4.2.2 HAVING AN OVERALL VISION AND THE LEADERSHIP TO IMPLEMENT IT.

As noted in the introduction, having an overall vision is crucial. The vision is foundational to the site management plan which, among other things, usually includes a plan for visitor experiences and relationships with nearby communities.

Since experiences and amenities in the destination area are key to maximizing tourism and economic impacts, a tourism vision for the entire area is also important. The tourism vision needs to be aligned with the site vision and established collaboratively with the tourism industry, local communities, other government agencies, and stakeholders. Kakadu National Park has employed this process, as illustrated.

Having a strong vision is the beginning. The leadership to implement it is a second, equally important factor. This includes leadership from the site itself and also from within the surrounding communities and tourism industry. The World Heritage Site, as the core attraction, is in a position to provide leadership to guide all the partners in working to achieve a common vision.

#### Illustration:

##### Kakadu National Park, AU

A plan entitled "Walking to the Future Together – a Shared Vision for Tourism in Kakadu National Park" was commissioned by the Kakadu Board of Management and the Governments of Australia and the Northern Territory. The project required the team to *"Develop a shared vision for tourism in Kakadu National Park. The vision must reposition Kakadu National Park as a unique destination with exceptional natural and cultural attributes; it must be effectively owned by key stakeholders and capture the public imagination"*. The Vision and its brand positioning were to provide a strategic platform to take Kakadu tourism forward and to feed into the subsequent management plan.

After an extensive process including collaboration and consultation with a wide range of 'communities', the Vision agreed to was:

*"Kakadu National Park is one of the great World Heritage Parks, recognised universally as a place with...*

- *a living Aboriginal culture – home to the Bininj/Mungguy;*
- *extraordinary natural landscapes and a rich variety of plants and animals;*
- *enriching and memorable experiences for visitors;*
- *a strong and success partnership between Traditional Owners, governments and the tourism industry, providing world's best practice in caring for country and sustainable tourism."*

Source: Kakadu... Walking to the Future Together, February 2005

Site staff also has knowledge and access to resources that can help build capacity within the community.

**Findings from the Case Studies:**

- ***Kakadu NP produces a management plan every seven years that sets out long-term goals. It is developed in consultation with stakeholders, partners and the public.***
- ***Gros Morne NP was a leader, working with other stakeholders, in preparing the Viking Trail Sustainable Tourism Accord, which set the scene for the development of tourism in the region.***

#### **4.2.3 COLLABORATING WITH FRIENDS ASSOCIATIONS, COMMUNITIES AND OTHER NON-PROFIT LOCAL ORGANIZATIONS.**

Long term collaboration with local communities and non-profit associations such as 'Friends' organizations can go a long way to making a World Heritage Site successful.

Local communities that are supportive of the World Heritage Site and actively engaged with the site are partners in its success. As partners, they are more likely to work together to develop and implement strategies to address issues, whether they are related to the long term protection of the resource or to managing tourism and creating economic activity. Gros Morne National Park has established strong community relationships, as illustrated.

Communities and 'Friends' organizations can be invaluable in advocating and building public and media support in ways that are not possible for government agencies. They can also access funds from other government agencies for site-related projects, and facilitate the participation of the private sector and other not-for-profit groups in strengthening the site and the destination area.

**Findings from the Case Studies:**

- ***Mesa Verde NP relies on its 'Friends' group (Mesa Verde Museums Association) to manage retail operations, a publishing program and education programs, funded through earned revenues.***

**Illustration:**

**Gros Morne National Park, CAN**

*Gros Morne National Park has a set of Principles for Engaging Communities:*

- *Seek First to Understand the Local Communities*
- *Be a Good Citizen and Neighbour*
- *Celebrate Who We Are*
- *Good Community Relations Involve All Staff*
- *Keep Promises, Come through on Commitments*
- *Be Proactive – Don't Wait to be Asked*
- *Build a Strong Partnership with Communities*

*The Park has a strong relationship with its adjoining communities, establishing a Mayor's Forum in 2001. Joint working groups from the Park and the communities work together to develop strategies to address issues using a collaborative approach.*

*The Park's Friends organization – the Gros Morne Cooperating Association earns revenue and sources funding to enhance visitor activities and conservation programs at the Park. They have also been instrumental in building and nurturing partnerships with community groups and the private sector to strengthen the destination area.*



- *The ‘Friends’ of Hawai‘i Volcanoes NP delivers customized guided programs using volunteer leaders and runs nightly programs for on-site hotel guests.*
- *Visitor services at Head-Smashed-In Buffalo Jump are delivered by a local non-profit historical association that funds visitor operations through admissions and program fees.*
- *Head-Smashed-In Buffalo Jump hires and invests in building the capacity of members of the local Blackfoot First Nation.*

#### 4.2.4 INVOLVING THE PRIVATE SECTOR IN DELIVERING SERVICES AND PROGRAMS.

The private sector has more operational flexibility than government agencies, can generally react much more quickly, and be pro-active on issues. They are more nimble and less-restricted, particularly when it comes to marketing and staffing, and usually more cost-efficient. One of the key features of arrangements with the private sector are clearly established operating and performance guidelines.

There are various approaches to involving the private sector in World Heritage Sites. The most basic is permitting private operators to deliver programs to their customers using the infrastructure of the World Heritage Site.

Others include:

- Concession arrangements whereby the private sector delivers select visitor services, sometimes including the necessary infrastructure, for an agreed upon fee, under clearly established operating and performance conditions. This could be food and beverage services, accommodations or visitor experiences.
- Licencing selected private operators to deliver programs to their customers in the World Heritage Site, restricting access to only those operators who are licenced. Again, some sort of fees along with operating and performance conditions would apply.

#### Illustration:

##### Purnululu National Park, AU

At Purnululu National Park, sixty-seven commercial operators are licensed to conduct business in the park. Four operators have a physical presence within the Park – one provides helicopter tours and an airstrip, the others accommodations – a lodge and campgrounds.

One of the campgrounds, Belburn, has luxury, safari tent-style accommodations with en-suite baths, hot showers, gourmet meals, beds and linens – priced at AU\$200 - \$700 per night – in a remote, wilderness outback setting.

The Belburn camp was established through Western Australia’s Naturebank initiative, a program jointly managed by the Department of Environment and Conservation and Tourism Western Australia. Naturebank “facilitates opportunities for private developers to create exceptional experiences that provide visitors with an appreciation of natural and cultural values”. Government does ‘pre-release’ work to obtain development clearances and then invites Expressions of Interest from the private sector; shortlisted proponents are invited to submit full proposals. The successful bidder is offered a lease with social and environmental performance clauses. Lease conditions reflect the level of capital investment required and the operating risk; they may also include preferred access to certain park services.

- Permitting (and actively encouraging and/or supporting) the private sector to develop and operate significant visitor infrastructure within the site, something that cannot be done by the site itself. This would either fill an identified need or open up new markets, again with some sort of fees and operating and performance conditions.

At Purnululu National Park in Australia, there has been a pro-active effort to involve the private sector not only in delivering programs and experiences within the Park, but also in developing and operating visitor infrastructure as described in the illustration on the next page.

#### **Findings from the Case Studies:**

- ***Gros Morne NP has a concession arrangement with the private business that operates boat tours on Western Brook Pond.***
- ***Mesa Verde NP outsources all hospitality services to a major corporation that also handles booking and packaging of these visitor amenities. This company provides similar services at other US National Parks.***
- ***At Kakadu NP, a significant portion of visitors arrive with private tour operators.***
- ***Purnululu NP has 67 commercial operators licensed to conduct business in the park.***
- ***At Hawai'i Volcanoes NP, the on-site hotel is operated by the private sector.***

#### **4.2.5 COOPERATING WITH ABORIGINAL STAKEHOLDERS TO ENHANCE THE TOURISM OFFER**

Many World Heritage Sites are on land that has traditional owners or is of major cultural significance to Indigenous peoples. In some cases a legally binding agreement governs relations between government and Indigenous groups concerning the management of the World Heritage Site, as is the case at Willandra Lakes Region (see illustration on the next page). In other cases the relationship is much less official or structured. Regardless of the formality of the arrangement, it is generally in the interest of tourism development to engage and involve aboriginal stakeholders in the tourism experience of the site.

Many tourists – particularly international – expect a first-hand experience of traditional aboriginal culture when they

#### **Illustration:**

##### **Willandra Lakes Region, AU**

Willandra Lakes Region WHS is different from the other case study sites in that it includes extensive private landholdings as well as a National Park (Mungo). It is governed by a comprehensive Plan of Management prepared in 1996 after a ground-breaking collaborative planning process involving the three Traditional Tribal Groups who occupied the lands, private landowners, communities, scientists and government. The three Tribal Groups share management decisions within the World Heritage Site area through a joint Elders Council.

Members of this Council are also involved on the Advisory Committee for Mungo National Park and have a lot of input into how the Park is managed from both an environmental and tourism perspective. Each school holiday period, one of the three Tribal Groups runs the Discovery Guided Tour program at this Park.



visit an aboriginal site, even if the reason for designation relates to practices far in the past. The involvement of aboriginal people in program delivery can enhance the visitor experience by helping to animate and bring to life an otherwise static archaeological resource; however, the nature of this animation must be decided jointly with the aboriginal stakeholders.

World Heritage Sites can be instrumental in bringing positive employment opportunities and economic development to local aboriginal communities. First, they can hire local First Nations as staff, both for program delivery and general site management. Second they can help to build the capacity of local entrepreneurs to provide tourism services in the destination area.

#### ***Findings from the Case Studies:***

- ***At Willandra Lakes Region, not only are Traditional Tribal Groups actively involved in co-management, they also share the delivery of guided experiences at Mungo National Park.***
- ***Wood Buffalo NP is in a process to develop a cooperative management board involving First Nations groups that have an interest in the site.***
- ***At Kakadu NP, involvement of the Bininj/Mungguy peoples in the visitor experience is fundamental to the site's vision and guiding principles.***
- ***At Purnululu NP, three out of four park rangers are members of the indigenous Aboriginal community.***
- ***At Head-Smashed-In Buffalo Jump, members of the local Blackfoot First Nation comprise a significant portion of the overall staff complement.***

### **4.3 THE VISITOR**

The success of a World Heritage Site as a tourist attraction begins with the visitor - Are they visiting? Are they returning? Are they spending? Are they satisfied? Have they had a good time? – these are the fundamentals that measure the success of the tourism industry and drive it towards excellence.

People are drawn to a World Heritage Site not just because of its world-class 'star' power but also because the place aligns with their interests. And they come away satisfied when it meets or exceeds their expectations, providing a positive experience that hopefully provides reason to return. Several best practices were identified that go into achieving this alignment between the World Heritage Sites' tourism products and visitor satisfaction, and it starts with, "knowing the customer".

#### **BEST PRACTICES: THE VISITOR**

4.3.1 Collecting statistics and survey data on current visitors.

4.3.2 Understanding demographic and market trends and what they mean for the World Heritage Site.

4.3.3 Identifying target markets and their needs and expectations.

#### 4.3.1 COLLECTING STATISTICS AND SURVEY DATA ON CURRENT VISITORS

The most basic indicator of a World Heritage Site's performance as a tourism destination is the number of visitors and how this number compares over time and with other regional tourist attractions. It's good practice to have a system in place to reliably count visitors that enter the site and, ideally, to track where they go and what they do. This data enables the plotting of visitation trends over time, informs operations (e.g. adjusting for peak visitation) and can also be used to compare results against competitors.

Beyond a head-count, World Heritage Sites can benefit from knowing generally who their visitors are, why they came and what they're looking to experience. The most basic type of information to collect is demographic, generally captured at point-of-sale or through on-site surveys that capture the age and place of origin of the visitor. Add to this group size, the reason for the visit and patterns of use within the site (services used and activities undertaken), and site management will be equipped with key information that can be used to identify trends and to inform operations and the planning of products and programs. Parks Canada has methodologies in place to achieve this, as described in the illustration on the previous page.

##### **Illustration:**

##### **Parks Canada Postal Code Data Capture, CAN**

Parks Canada collects data on visitors in diverse ways. First, it captures the number, age and group size of visitors at point-of-entry. Second, it conducts a formal visitor survey every few years aimed at learning more about the visitor, motivations and levels of satisfaction, learning and enjoyment. Finally, it has implemented an innovative point-of-sale system at most of its locations including Gros Morne National Park (Wood Buffalo National Park has too few visitors) that enables the collecting of postal and zip code information. By cross-referencing this information with a proprietary database called Prizm C2, Parks Canada analysts are able to learn a great deal about the habits and interests of visitors based simply on the neighbourhood in which they live. This in-depth information is then used by a site to inform the development of products and programs, as well as the best marketing media to employ.

World Heritage Sites that undertake periodic visitor surveys have the added benefit of being able to monitor levels of satisfaction, learning and enjoyment, as well as to solicit feedback on improvements that could enhance the visitor experience. Feedback is also easily acquired through comment cards and on-line customer review sites, which should be regularly monitored and, as possible, acted upon.

##### **Findings from the Case Studies:**

- ***Mesa Verde NP collects and publishes visitor attendance and on-site accommodation use on a monthly basis.***
- ***Gros Morne NP and Wood Buffalo NP conduct extensive summer visitor surveys about every five years and produce VIP (Visitor Information Program) reports that include a comparison to earlier surveys.***

- ***Tourism Northern Territory (Australia) publishes detailed quarterly statistics on visitors to Kakadu NP.***

#### 4.3.2 UNDERSTANDING DEMOGRAPHIC AND MARKET TRENDS AND WHAT THEY MEAN FOR THE WORLD HERITAGE SITE.

The data collected on current visitors gives a snapshot of who's visiting the World Heritage Site right now. But, what about those who choose not to visit? Who else might be attracted to visit if different opportunities were made available; and what expectations will visitors bring to their visit in the future?

To aid in the planning of products, programs and operations, some World Heritage Sites undertake research so as to know the trends and circumstances that could influence visitor choices and preferences into the future. This includes demographic changes as well as social, technological and economic factors. Head-Smashed-In Buffalo Jump considers such research, as illustrated.

For example, while baby boomers (age 55+) currently account for the largest segment of World Heritage Site visitors, their "Millennial" offspring represent the next generation of visitors. Many World Heritage Sites are realizing they must adjust their programs to accommodate the needs and expectations of this young cohort born into a digital world that assumes 24/7 media and social connectivity. At the same time they need to accommodate the needs of their aging visitors, for example by providing hard-sided camping ("glamping") options such as the O'Tentik that Parks Canada recently introduced at Gros Morne National Park as well as at other parks it manages across the country.

A trend within the consumer economy that has had great impact on the tourism industry in the past decade is the emphasis on customized products and experiences. Translated to a World Heritage Site, where static interpretive presentations and guided tours were once the standard, visitors are increasingly looking for dynamic and immersive experiences involving active hands-on interaction and social sharing. Tourists have come to expect choice just as they have in their shopping, dining and entertainment pursuits.

##### ***Findings from the Case Studies:***

- ***Kakadu NP has drawn on extensive market research undertaken by Tourism Australia and Tourism Northern Territory,***

##### **Illustration:**

##### **Head-Smashed-In Buffalo Jump WHS, CAN**

Visitation at Head-Smashed-In Buffalo Jump has not kept pace with other tourism attractions in the region and site management has been analysing why. Some of this decline appears to stem from not meeting the needs of visitors. For example, one large visitor segment has been Americans travelling in recreational vehicles who would camp nearby and make an excursion to the World Heritage Site. That campground closed down, however, so the RVs began parking at HSIBJ. But, government regulations forbid overnight parking and once the ban came into effect the site saw an immediate drop in visitation.

Another example pertains to family audiences. The site recognizes that it needs to offer more dynamic hands-on activities to satisfy this important target market and so is introducing new immersive programs this summer that engage visitors in the experience of traditional Blackfoot culture.

*to inform their 2009-2014 Tourism Master Plan.*

- *Hawai'i Volcanoes NP is looking at new ways of reaching out to younger markets and changing methods of delivering programs so as to connect with these markets.*

#### **4.3.3 IDENTIFYING TARGET MARKETS AND THEIR NEEDS AND EXPECTATIONS.**

We live in a data driven world and one of the benefits for the tourism industry is a better understanding of consumer behaviour regarding travel and tourism. Information-rich databases have spawned proprietary market segmentation tools, some of them employed at World Heritage Sites.

As at any tourism attraction, World Heritage Sites must make careful decisions about where best to invest their capital and operational budgets. It is unrealistic to think a site can hold equal appeal and value for all people, so it is prudent to identify those market segments with the greatest potential and focus efforts on attracting and satisfying them. As already noted, consumer tastes evolve and if World Heritage Sites are to compete in the tourism sector they need to be aware of and responsive to these changes. By using market segmentation tools to provide insights into the needs and expectations of target markets, World Heritage Sites will be well equipped to facilitate experiences that are both positive and memorable, in turn helping the site to succeed as a tourism attraction. Kakadu National Park has adopted such an approach, as described in the illustration on the next page.

##### ***Findings from the Case Studies:***

- *Destination Canada (formerly known as the Canadian Tourism Commission) licenses Explorer Quotient (EQ) to both Parks Canada and Tourism Alberta for the benefit of their sites.*
- *Tourism Australia has similarly introduced a market segmentation tool that Parks Australia employs at sites such as Kakadu NP, as described in the illustration below.*

#### **Illustration: Kakadu National Park, AU**

Deriving from its Management Plan, Kakadu National Park elaborated a Tourism Plan to inform visitor-experience planning from 2009-14. Employing Tourism Australia's market segmentation tool, site managers identified 'experience seekers' as the target market that best matches the current and potential experiences Kakadu has to offer and that can deliver the best outcomes for the Park.

This globe-trotting segment is characterized by an interest in being enriched by culture and landscape, and to seek inspiration and self-discovery as well as recreation, adventure and relaxation. To meet the needs of, and encourage this segment to spend more nights in the Park, the site planned to develop a suite of experiences and facilities aimed at fostering connection with the land and its people; reflecting the natural diversity of the Park, Indigenous culture, and the Bininj calendar of seasons; and enabling interaction with the Indigenous clan groups.

## 4.4 THE PRODUCT

World Heritage Sites have been designated by UNESCO as internationally significant for their outstanding universal natural or cultural values. Through their inscription, World Heritage Sites are protected and conserved for future generations. The products and experiences offered must therefore, first and foremost, ensure the integrity of the cultural or ecological resource.

At some sites, the authentic features and values that have earned them UNESCO protection are products in their own right, and require little programming or elaborate infrastructure to ensure a quality visitor experience and justify a visit (for example, Hawai'i Volcanoes National Park where the active volcano is the core experience). However, if the Outstanding Universal Value is not as evident – for example, the significance of Head-Smashed-In Buffalo Jump resides in buried archaeological evidence – but the site has a tourism and/or economic development mandate, then strong programming can create appealing experiences that will attract visitors, extend the length of stay and encourage repeat visitation.

At the same time, it is important that the products and experiences offered respond to market trends – changing demographics and interests, and expectations for meaningful, hands-on experiences rather than static displays.

### 4.4.1 OFFERING A CHOICE AND DIVERSITY OF EXPERIENCES TARGETED TO VISITOR INTERESTS

Visitors to World Heritage Sites have a wide range of motivations for their visit along with varying interests and expectations. For some, it is sufficient simply to drive through and feast on the natural beauty of the place without making use of services or programs. Others want to linger and more fully experience what the site has to offer.

World Heritage Sites that build on their core values and authenticity to create a choice and diversity of experiences, providing visitors with the opportunity to immerse themselves in the resource and to experience it in ways that suit them, will have greater success as tourism destinations. Gros Morne National Park is an excellent example of this best practice, as discussed in the illustration.

Offering a diversity of experiences that respond to visitor interests can have many impacts:

- Impart knowledge and learning about the site, its natural or cultural environment and what makes it special.
- Encourage longer stays at the site (or close enough to experience the site on multi-occasions).

### BEST PRACTICES: THE PRODUCT

4.4.1 Offering a choice and diversity of experiences targeted to visitor interests.

4.4.2 Involving Aboriginal peoples and/or local hosts in the development and delivery of programs and services.

4.4.3 Having up-to-date, well-maintained visitor infrastructure.

Longer stays translate into greater tourism and economic impacts. Note that this requires planning by visitors so having good pre-trip planning information on what there is to see and do and how long a stay is necessary becomes essential.

- Open up the site to more visitors – such as those who might not consider the core feature of interest, or those who have been before but return for another experience. Again, this translates into greater tourism and economic impacts.
- Result in greater visitor satisfaction - within individual visitors and within groups of visitors with different interests. Through on-line reviews and word of mouth promotion, this also can contribute to greater tourism and economic impacts.

World Heritage Sites should also consider harnessing mobile technology as a means of diversifying the visitor experience and connecting with new audiences. Augmented Reality (*a live direct or indirect view of a physical, real-world environment whose elements are augmented (or supplemented) by computer-generated sensory input such as sound, video, graphics or GPS data*; Source: Wikipedia.) is one such example that can allow visitors to have a more in-depth, self-guided experience.

#### **Findings from the Case Studies:**

- **Wood Buffalo NP has identified an opportunity to offer unique and special experiences related to the endangered Whooping Crane, to international birding markets, thereby attracting a new market to the site.**
- **Mesa Verde NP recommends a selection of things to do, essentially itineraries, according to the time available for visiting the park.**
- **Head-Smashed-In Buffalo Jump has identified its primary visitor segments using EQ profiles.**

#### **Illustration:**

##### **Gros Morne National Park, CAN**

Gros Morne National Park is an industry leader in how best to identify and develop experiences that respond to the interests of visitors. The process began with the identification of target markets using EQ (Explorer Quotient), the innovative market segmentation tool based on the science of psychographics (<http://en.destinationcanada.com/resources-industry/explorer-quotient>), developed by Destination Canada and licensed to Parks Canada. EQ helps better understand the motivations and needs of visitors – and what types of experiences interest them – resulting in more targeted offerings matched to the needs and interests of visitors.

With knowledge of the Park's primary EQ targets, a Visitor Experience Opportunities Concept (VEOC) process involved extensive brainstorming with stakeholders from within and outside the Park, to identify and develop experiences that matched these segments.

One of the concepts that emerged is 'The Red Chairs Experience Program'. This program encourages visitors to seek out the Red Chairs, strategically placed at landscape viewpoints to enhance their exploration of the site – and to share their experience through social media. The Red Chairs have proven so popular they are now in many Parks Canada sites across the country.

#### 4.4.2 INVOLVING ABORIGINAL PEOPLES AND/OR LOCAL HOSTS IN THE DEVELOPMENT AND DELIVERY OF PROGRAMS AND SERVICES.

Many World Heritage Sites, both cultural and natural, are important to First Nations/Native Americans/ Aboriginal/Indigenous peoples and/or are on traditional lands. These peoples are inherently vested in these sites, some of which are sacred places or possess important cultural significance.

When the Aboriginal values of a World Heritage Site are integral to the UNESCO Statement of Significance, it becomes much more critical that Aboriginal peoples be the ones to tell the stories of these sites.

Visitors, particularly those from international markets, have a strong interest in learning about traditional cultures and personally connecting with Aboriginal peoples. Sites that involve Aboriginal peoples in program delivery, first-person interpretation and animation are able to offer more authentic experiences that both meet visitor expectations and respect the cultural values of the site that earned it its World Heritage List inscription. At Head-Smashed-In Buffalo Jump, First Nations peoples are extensively involved in program delivery, as described in the illustration.

Involving local hosts – people from nearby communities – in program delivery similarly enriches the visitor experience by enabling first-hand, informal contact with local peoples and culture regardless of ethnicity.

##### ***Findings from the Case Studies:***

- ***At all three Australian sites – Kakadu NP, Purnululu NP and Willandra Lakes Region, Aboriginal people from traditional tribal landowners are actively involved in program delivery, either as staff or through business that deliver guided experiences.***
- ***At Hawai'i Volcanoes NP, a site that is sacred to native Hawaiians, traditional cultural experiences are offered to visitors.***
- ***At Head-Smashed-In Buffalo Jump tours and programs are delivered by local Blackfoot people.***

#### **Illustration: Head-Smashed-In Buffalo Jump WHS, CAN**

Experiencing the majestic landscape and the site where bison were herded over the edge of high cliffs at Head-Smashed-In Buffalo is enriched by one-on-one interaction with First Nations people. Members of the local Blackfoot community are actively involved in the operation of the site. About 75% of the staff, both seasonal and full-time is from the Blackfoot community, and most of the visitor services staff is Blackfoot.

These staff greet visitors and provide an orientation. They also deliver a 45 minute interactive program which is one of Destination Canada's Signature Experiences. Other First Nation's cultural experiences, such as drumming and dancing are offered regularly, along with occasional sleep-overs in teepees.



#### 4.4.3 HAVING UP-TO-DATE, WELL-MAINTAINED VISITOR INFRASTRUCTURE.

Tourism markets generally have become hard to please and visitors to World Heritage Sites appear to be no exception. Keeping visitor infrastructure up-to-date and with expected services is an important element of visitor satisfaction.

Basic infrastructure such as roads and bridges, toilets and campground facilities is foundational to the visitor experience and is for the most part taken for granted. For example, roads enable exploration of a park and access to viewpoints, campgrounds enable overnight experiences, and visitor centres provide information and other services. However, any infrastructure has a life span and it is when these networks and facilities are not present or in good condition or working order that they can end up figuring negatively in a visitor's take-away memory.

In today's connected world, expected services usually include Wi-Fi access. Visitor centres are often expected to employ the latest media in interpretive presentations. Mesa Verde National Park has addressed these issues with a new interpretive facility, as illustrated.

With the growing popularity of oversize recreational vehicles, pressure is on World Heritage Sites to configure campsites and roadside scenic viewpoints to accommodate these vehicles. Keeping services and infrastructure such as these up to date and in good condition can be extremely costly for a World Heritage Site but must, nevertheless, be factored into operations. Some sites in the US have involved the private sector in their efforts to ensure up-to-date visitor infrastructure.

#### Illustration

##### Mesa Verde National Park, US

Mesa Verde opened a brand new Visitor and Research Center in 2012. This LEED (Leadership in Energy and Environmental Design) certified building replaced an aging facility and serves as the primary point of entry for orienting visitors to experiences within the World Heritage Site. It also houses state-of-the-art research and storage facilities for the Park's archives. It provides exhibits on the site and the Ancestral Pueblo people, as well as on its own energy saving and sustainability features. A bookstore, washrooms and free Wi-Fi are also found at the Center.

#### ***Findings from the Case Studies:***

- ***At Hawai'i Volcanoes NP the on-site hotel, Volcano House, was totally renovated and refurbished in 2013 to keep up with visitor expectations.***
- ***Both Hawai'i Volcanoes NP and Mesa Verde NP are looking at how to configure roads and viewing areas to accommodate visitor traffic, in cars, on foot and by bike.***

## 4.5 THE DESTINATION AREA

World Heritage Sites are often the demand generator for a destination area – the reason for the visit. However, being a successful tourism destination requires more – demand supporters (other things to see and do), visitor amenities such as lodging and dining, services such as gas, and transportation access and networks to help visitors find their way around.

### 4.5.1 HAVING A CRITICAL MASS OF EXPERIENCES AND AMENITIES IN THE DESTINATION AREA.

World Heritage Sites, by their very nature, offer a unique or special experience that attracts visitors; they are the ‘hook’. Sometimes these experiences are sufficient by themselves to keep visitors for several days. More frequently, however, the site can be experienced in a much shorter time, a half-day or less.

Maximizing the tourism and economic impacts associated with the World Heritage Site requires retaining visitors longer thereby increasing their spending. This means providing more things for them to see and do in the destination area – festivals and events, entertainment, cultural and outdoor activities, shopping, workshops and learning programs, museums and galleries, heritage sites, storytelling, music, etc. In the Gros Morne National Park area communities, private sector and others have worked to establish a strong mix of such experiences, as described in the illustration on the next page.

A critical mass of experiences in the area can help attract visitors to the World Heritage Site itself by broadening the offer and appeal of the area. They can also help extend the season, which supports business viability. Visitor amenities – accommodation, food and beverage and basic services such as gas and banking are also necessary to keep visitors in the area.

Much of the destination area infrastructure and amenities are supplied by the private sector. Actively involving them in destination area development is critical; the services they provide need to ‘match’ with the needs of the target markets identified for the World Heritage Site and be sufficient to accommodate peak demand periods, as well as extended operating seasons.

#### ***Findings from the Case Studies:***

- ***Mesa Verde NP has limited accommodation on-site but nearby communities provide accommodations, campgrounds and other visitor amenities.***

### BEST PRACTICES: THE DESTINATION AREA

4.5.1 Having a critical mass of experiences and amenities in the destination area.

4.5.2 Having good transportation access with options.

4.5.3 Providing wayfinding and, as appropriate, internal transportation networks.

- ***Kakadu National Park offers an assortment of activities, both cultural and recreational, on-site as well as a range of dining and accommodation options in three visitor nodes.***

#### **4.5.2 HAVING GOOD TRANSPORTATION ACCESS WITH OPTIONS**

World Heritage Sites located in or close to major urban centres or in major destination areas will naturally be more successful in attracting larger volumes of visitors owing in part to the relative ease with which they are accessed.

For rural sites, proximity and ease of access from airports with direct or connecting international service, and/or from major urban centres is important. Connecting links from these airports or urban centres are critical – with self-drive (e.g. car rental) an essential service and public transportation or private tour options important to some market segments.

For more remote sites, access either by road, boat or fly-in service poses much more of a challenge and can be very costly, requiring a committed decision to visit the site or destination area and the means to afford it.

For these sites, having a number of different options available and making it easy for potential visitors to find information on these options will facilitate the decision to visit. For some of these sites, the remoteness and access challenges are part of the appeal. A good example is Purnululu National Park, described in the illustration, where there are various transportation options.

#### **Illustration:**

##### **Gros Morne National Park, CAN**

The Gros Morne Cooperating Association (GMCA) has worked with the Park, community groups, other agencies and private businesses to facilitate development of an extensive range of cultural and entertainment options. These include festivals, theatre, ‘in-residence’ programs, storytelling and music. GMCA has nurtured and supported (financial and human) community groups to get these programs off the ground. And, for some, they have been the lead organization. Some are within the Park, others in the adjoining communities. Particular attention has been paid to activities that help extend the season, such as early and late season festivals. Examples include:

- Gros Morne Theatre Festival, Cow Head – storytelling, dinner theatre, music, drama
- Writers at Woody Point – a 4 day literary festival
- Gros Morne Summer Music – a classical music festival
- Live music performances in local venues, such as Anchors Aweigh
- Artist-in-residence programs
- Spring “Trails, Tales & Tunes” Festival
- Cow Head Lobster Festival
- Gros Morne Fall Fair
- Passing the Time in Trout River – one evening a week of music and culture featuring local performers

One important outcome has been making the area a more appealing and vibrant place to live, start a business and raise a family.

#### **Findings from the Case Studies:**

- ***At Head-Smashed-in Buffalo Jump, a new service will be inaugurated in 2015 to provide commercial bus day-tours from Calgary. It is hoped that this will help to increase visitation, particularly from visitors to Calgary that may not have a vehicle.***
- ***At Willandra Lakes Region (Mungo National Park) a tour operator provides day trip service from the nearest communities.***

#### **Illustration:**

##### **Purnululu National Park, AU**

This is a remote site – 250 km on the highway and 52 km on an unpaved road, recommended for 4WD vehicles. Visitors have a number of transportation options:

- Take a flightseeing tour from the nearest community (without landing).
- Travel to the Park by air – there is an air strip within the Park and private air service via helicopter and fixed-wing aircraft (45 minutes).
- Drive to the Highway junction (in own vehicle or rented car from the nearest community), park and take a private shuttle service for the 52 km road into the Park.
- Drive your own vehicle into the Park.

#### **4.5.3 PROVIDING WAYFINDING AND, AS APPROPRIATE, INTERNAL TRANSPORTATION NETWORKS.**

Once visitors arrive at a World Heritage Site, they need to find their way to places, activities and experiences of interest along with the necessary visitor services. One of the more common complaints seen in visitor satisfaction surveys and on-line reviews is poor signage or directions within the sites.

Internal transportation systems within sites are often dependent on automobiles. At World Heritage Sites where there are one or two key places of interest and high visitation levels, congestion can become a big challenge and negatively impact the site's natural environment and the visitor experience, as well as cause safety issues. These challenges can be compounded at sites that receive tours from cruise ships with large numbers of motor coaches in a brief period of time. Good vehicle circulation systems with clear signage and techniques for handling crowds become critical. At the same time, park managers are balancing visitor access with the need to protect the resource and minimize the footprint of built infrastructure (e.g. large road networks) that can overwhelm the site. Mesa Verde National Park is addressing these issues in planning, as illustrated.

#### **Illustration:**

##### **Mesa Verde National Park, US**

Mesa Verde National Park is facing internal transportation challenges – handling congestion at peak times without negatively impacting the environment or the visitor experience.

The Park is currently doing a Visitor Distribution and Transportation Master Plan with a goal of reducing overcrowding at key locations during peak periods and improving wayfinding. Part of this is implementing a multi-modal transportation system within the Park which would also open up new areas to visitors.

Some World Heritage Sites have implemented free shuttle busses to address these types of challenges. These services also provide visitors arriving without a car a way to explore the site and can help control access to sensitive areas.

**Findings from the Case Studies:**

- ***Hawai'i Volcanoes National Park is in the midst of a new Park management plan. One of the key strategic elements is dispersing use to create a less congested and more tranquil experience, and reducing conflict between vehicles and visitors (which includes evaluating a shuttle option).***

## 4.6 MARKETING

Marketing is a broad term that encompasses a host of activities. While few World Heritage Sites engage in paid advertising and may maintain that marketing is not a core function, they do nevertheless undertake activities that serve to raise awareness and attract visitors to the site. For example, all sites to a greater or lesser degree manage websites, produce lure and trip-planning print materials, handle media and public relations, work with the travel trade, and interact with local tourism operators and destination marketing organizations at various levels.

To maximize tourism and economic impacts, a consistent and coordinated marketing effort, if not by the site itself, then by other tourism marketing organizations is crucial. The starting point for all effective marketing efforts is a clearly enunciated brand and market position; some World Heritage Sites have invested more effort in this than others.

### 4.6.1 HAVING A STRONG BRAND THAT COMMUNICATES THE POSITIONING AND BENEFITS TO TARGET MARKETS.

Good business practice begins with a clearly articulated vision of what you have to contribute, how your product will make a difference, why consumers should buy – in effect, your position within the marketplace. World Heritage Sites operate as attractions within the tourism industry and, to that end are, in effect, businesses. And, if the goal is to maximize tourism and regional economic impacts, a business-oriented approach, particularly around marketing, is a fundamental good practice.

### BEST PRACTICES: MARKETING

4.6.1 Having a strong brand that communicates the positioning and benefits to target markets.

4.6.2 Using the World Heritage Site brand in marketing to create profile and attract visitors.

4.6.3 Having a strong and consistent profile in destination marketing, including iconic images to capture attention.

4.6.4 Having detailed, easy-to-use trip planning information on-line.

4.6.5 Having a strong and engaging social media presence.

The first step in developing a brand is having a positioning strategy – understanding what you have to offer that is compelling and differentiates you from the competition in identified target markets. Bringing these together into a message that conveys the benefits of your product to customers, and then communicating this message in an attention-getting fashion establishes a brand. Kakadu National Park has been through the branding process, as illustrated.

A brand benefits more than marketing efforts. It informs the identification of target markets and helps to guide and align staff, stakeholders and partners in their activities and investments in the World Heritage Site, including way finding, visitor experience and infrastructure, helping to ensure that time and money are spent wisely and to maximum effect.

#### **Findings from the Case Studies:**

- ***Purnululu National Park is positioned as an iconic, last frontier destination for Western Australia and for Australia overall.***
- ***Head-Smashed-in Buffalo Jump and Purnululu National Park have distinctive names that resonate with visitors and help create an image of the attraction.***

#### **4.6.2 USING THE WORLD HERITAGE SITE BRAND IN MARKETING TO CREATE PROFILE AND ATTRACT VISITORS**

When the World Heritage Convention was adopted more than 40 years ago, attracting tourists to the sites was not a major consideration. With the explosion in global tourism in the past 30 years, many World Heritage Sites have become significant tourism attractions – the sites, by their very nature, are authentic, unique, different and special natural or cultural places – the types of places sought by today’s travellers who want authentic and memorable experiences and opportunities to learn about the destinations they visit. Tourism and related socio-economic impacts have become more important motivation factors for World Heritage Site designation since the mid-1990s.

The literature suggests that World Heritage Site status does indeed provide a promotional advantage and a branding effect that can boost visitation (*PriceWaterhouseCoopers, 2007*). The literature also

#### **Illustration:**

##### **Kakadu National Park, AU**

Kakadu National Park has benefited from the efforts of Tourism Australia and Parks Australia to market Australia as an international tourism destination of choice. These agencies have employed sound business practices, and brand development is a core feature.

In alignment with these agencies, Kakadu National Park undertook an exercise to develop its brand positioning and implementation strategy, undertaken in collaboration with stakeholders through a series of workshops. This process included identifying target markets.

The brand statement reads – “*Kakadu is a 50 000-year-old living cultural landscape that interacts with nature and the seasons. The awesome, ancient Arnhem Land escarpment frames this World Heritage-listed wetland. It is a place with deep spiritual richness and history that inspires the senses, commands deep respect and provides self-discovery, enlightenment, adventure and relaxation.*”

reveals that the World Heritage Site designation bestows upon a site the mantle of 'authentic, unique and world class.' (*Rebanks Consulting and Trends Business Research Ltd, 2009*).

What is not evident is the extent to which the World Heritage Site brand has an impact on promoting visitation. One source suggests that the impact is marginal, though stronger for less famous or iconic sites. (*PriceWaterhouseCoopers, 2007*).

With the large number of World Heritage sites (currently over 1000) around the world, there is growing awareness of the UNESCO designation. It would appear, from our research, that the World Heritage Site brand has much more of an impact on international markets than it does on domestic markets, particularly US domestic markets.

Head-Smashed-In Buffalo Jump World Heritage Site is an example of a site that uses the World Heritage Site brand and sees it as having a big impact on international visitors, as discussed in the illustration.

### Illustration:

#### Head-Smashed-In Buffalo Jump, CAN

Head-Smashed-in-Buffalo Jump World Heritage Site is the full name for this site and is used this way in their own marketing efforts. Promotion of the site by Alberta Tourism and Destination Canada mentions the WHS designation, but does not always include it as part of the name.

According to interviewees, the "WHS Brand is huge" particularly for international visitors who add the site to their 'bucket list' during their tour of Alberta. International visitors are an important market segment for the site - accounting for some 35% of visitors (and another 17% are Canadians from outside Alberta).

#### **Findings from the Case Studies:**

- ***Research at Gros Morne NP illustrates that the role of the WHS brand in attracting visitors has been increasing, although it is still a relatively minor factor.***
- ***At Purnululu NP, the WHS designation is actively used in all marketing materials; however, the impact on attracting visitors is unknown.***
- ***Mesa Verde NP acknowledges the importance of the WHS brand for attracting international visitors, but believes it is less meaningful for Americans.***

#### **4.6.3 HAVING A STRONG AND CONSISTENT PROFILE IN DESTINATION MARKETING, INCLUDING ICONIC IMAGES TO CAPTURE ATTENTION.**

Some World Heritage Sites (e.g. Hawai'i Volcanoes National Park) are in locations with such large numbers of visitors and/or are such iconic sites (e.g. Sydney Opera House, Statue of Liberty) that extensive marketing is no longer necessary to encourage visitation.

For many World Heritage Sites, however, particularly those in rural and remote areas, significant and consistent marketing efforts are vital to attracting visitors and maximizing their tourism and economic impacts.



Provincial/state and national tourism marketing organizations are in the best position to do this – they have the expertise, the presence in targeted domestic and international markets, and a solid understanding of what attracts tourists to their destination. Gros Morne National Park (see illustration) is one site where provincial and national marketing efforts have been consistent and highly successful.

One challenge for the World Heritage Sites is to ensure that their profile within the destination's marketing efforts is visible, consistent and maintained year over year. Our research has shown that if the marketing profile is diminished, visitation levels can decline.

***Findings from the Case Studies:***

- ***Purnululu NP is promoted by the regional DMO, Western Australia Tourism (where it is featured in promotion to domestic and international markets) and Tourism Australia where it is often featured in major campaigns for international markets. A significant portion of visitation to the Park is from international markets.***
- ***Kakadu NP benefits from co-ordinated marketing efforts at the national and regional levels, and Parks Australia has partnered with Tourism Australia to promote iconic destinations such as Kakadu to international markets. Again, international visitors comprise an important percentage of overall visitation.***

**Illustration:**

**Gros Morne National Park, CAN**

Gros Morne National Park has been profiled as one of Newfoundland & Labrador's iconic destinations for more than ten years. The provincial Department of Tourism regularly uses iconic images of the Park (and identifies it as GMNP) in domestic advertising and it is profiled in on-line marketing. GMNP is featured as one of the top destinations in the province. The Park is also profiled in international marketing efforts (particularly the UK and New England/Mid-Atlantic US) through regional (Atlantic Canada Tourism Partnership) and national partnerships (Destination Canada), using consistent images and messaging. The regional DMO (GO Western Newfoundland) uses the same images and messaging in its work with travel media and the travel trade. Gros Morne is the featured image on arrival at the Deer Lake airport.

These efforts have been successful. 23% of all visitors to Newfoundland & Labrador visited the Gros Morne area in 2011, up from 16% in 2003/04 (and with a much larger base of visitation). US (29%) and international (40%) visitors to the province were much more likely to go to the Gros Morne area<sup>1</sup>.

<sup>1</sup> Government of Newfoundland & Labrador, Tourism Research Division, 2011 Exit Survey: Profile of Non-Residents Visiting the Western Region (Economic Zones 6 – 10)

#### **4.6.4 HAVING DETAILED, EASY-TO-USE TRIP PLANNING INFORMATION ON-LINE.**

The Internet is the premier source for potential travellers seeking information about destinations they are interested in visiting. Well-designed, visitor-oriented websites provide a positive first-impression. They are also valuable tools for providing more detailed educational information and resources on the

site's natural environment, cultural heritage, protection and conservation, and management. Kakadu National Park's approach to on-line trip planning is described in the illustration.

World Heritage Sites can make maximum use of their websites to provide the detailed information visitors need, including:

- Pre-trip planning information such as:
  - Transportation access and options
  - Experiences available and how to book and pay for them, if appropriate
  - How much time to plan for a visit and what to do for different lengths of stay
  - Basic information on the surrounding destination
  - Links to local DMO (Destination Marketing Organization) websites for details on accommodations, other attractions in the region, etc.
  - Cautions about site restrictions, weather, closures, etc.
  - Links to private operators offering tours to/within the site
- On-trip/on-site planning such as:
  - Booking and purchasing tickets
  - Details on experiences available
  - Up-to-date information on site conditions

### **Illustration:**

#### **Kakadu National Park, AU**

Parks Australia was receiving negative feedback from visitors about website quality and decided to take action. Going back to first principles it began the renewal process by identifying objectives and target audience of the website. This led to the innovative decision to detach trip planning from corporate information by creating two separate but linked websites, each with a distinct purpose, tone and voice.

The end result is a highly visual and alluring tourism-oriented website ([www.parksaustralia.gov.au/kakadu/](http://www.parksaustralia.gov.au/kakadu/)) that markets at the same time as it provides comprehensive trip planning information. For information on the management of the Park, viewers are directed to the corporate entity.

With increasing use of mobile technology, particularly for on-trip information, websites need to be mobile-friendly.

Strong links from World Heritage Site websites to 'official' local/regional tourism sites are important to provide visitors with information on the other experiences at destination area and visitor amenities, and to encourage extended stays and spending.

#### ***Findings from the Case Studies:***

- ***Hawai'i Volcanoes NP's website provides up-to-date information on volcanic activity at the park as well as suggestions as to what to do for varying lengths of stay.***
- ***Gros Morne NP and Wood Buffalo NP websites provide detailed trip planning information on access and visitor experiences with links to regional tourism websites with more detail on the surrounding destination areas.***

#### 4.6.5 HAVING A STRONG AND ENGAGING SOCIAL MEDIA PRESENCE.

Social media has changed the way businesses connect with consumers and the way consumers connect with businesses; this is very evident in the tourism sector. Travellers use social media to learn about things to see and do, find detailed information, seek out deals, and get reviews and suggestions from fellow travellers. The proliferation of social media is evidenced by a recent PhoCusWright study that found that 90% of outbound US travellers were active on social media.

Social media allows tourism businesses to have one-on-one conversations with prospective clients and to build a customer relationship; it allows the business to tell their story in a way that can be shared further and faster than ever. While all age groups use social media, it is an absolutely essential marketing tactic to connect with younger generations.

There are many social media channels, the most popular being Facebook, Twitter, YouTube and Instagram. Channels constantly evolve and more and more are being established each year.

Social media marketing needs strategic management, a plan of execution and the investment of resources (human and financial) to achieve its potential for individual sites. Different strategies are required for different target markets. Hawai'i Volcanoes National Park's has implemented a social media strategy, as illustrated.

##### ***Findings from the Case Studies:***

- ***Most sites are active on social media (primarily Facebook and Twitter) to some extent, but often under the same umbrellas as other parks in the organization and/or in the same geographic region.***
- ***Potential visitors*** to Hawai'i Volcanoes National Park are able to use social media to find out the status of any volcanic activity as well as other site conditions.

### **Illustration**

#### **Hawai'i Volcanoes National Park, US**

Hawai'i Volcanoes National Park launched a social media strategy in 2012. In 2014 they established a multi-disciplinary social media team to ensure that content was diverse fresh and informative. Each program area within the Park has a voice on what they feel is important to visitors – team members from site Maintenance, Interpretation, Administration, Cultural Resources, Natural Resources and Protection programs all contribute to the Park's Facebook pages. Facebook posts cross-pollinate other social media platforms. HVNP has its own Twitter account with 4500 followers.

Facebook likes have jumped since this team was formed – growing from 12,000 in March 2014 to 68,000 in spring 2015. There are multiple posts a day from the Park, and lots of engagement with followers.

# CHAPTER 5: IMPLICATIONS FOR CANADA

Building on the best practices seen in the eight case studies of World Heritage Sites in Canada, Australia and the United States, this section considers what it means for Canadian tourism destinations. What are the significant features that contribute to the success of Canadian World Heritage Sites as a tourism draw? How can Canadian World Heritage sites leverage the international recognition provided by UNESCO to support tourism goals and economic development in their region.

The following is a collection of ten high-level findings for consideration.

## 1. PROTECTING THE HERITAGE RESOURCE

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Inscription on the World Heritage List is predicated on the protection and conservation of the cultural and/or natural values considered of Outstanding Universal Value, for which the site was designated. The sustained integrity and authenticity of these heritage resources for future generations is an imperative that must not be compromised and should inform all operations and activities. At the same time, the World Heritage Site has a mandate to “present and inform”, achieved by facilitating public access, education and enjoyment. Invariably, advocates for each of these two halves of the World Heritage mandate engage in a dialectic concerning the best way to manage the site. Constant co-operation and collaboration amongst these players will ensure that a reasonable balance is achieved.

## 2. TAKING A VISITOR PERSPECTIVE

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World Heritage Sites inform and educate the general public by enabling both physical access to the site and intellectual access to the content. But the experience of a site is highly personal. Visitors are unique individuals with different interests and motivations, and these translate into specific needs and expectations for the visit. World Heritage Sites in Canada can gain insight into their visitors by collecting information about and feedback from current visitors, and monitoring market and demographic trends that could influence visitor preferences in the future. Armed with this information, sites will be able to identify their target markets using segmentation tools such as Explorer Quotient and to invest their resources wisely toward attracting and satisfying those visitors. By regularly monitoring results as well as the evolving environment, sites will be able to adjust operations, balanced with conservation needs, to maximize visitor enjoyment.

## 3. HARNESSING THE WORLD HERITAGE BRAND

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Tourism is the fastest growing economic sector globally. Around the world people are on the go, spending leisure time and money to explore and experience new places and cultures. The tourism marketplace is highly competitive and players at all levels, from national to local, are jockeying to entice visitors to their destinations. With its promise of world-class quality and iconic distinction, the World Heritage brand is unique within the tourism marketplace. Communicating in a language that translates across nations, it is a hook to attract international audiences who might not otherwise be familiar with a national park, historic site or other protected resource. Australia and Canada appear to understand this

brand power and are making use of it. World Heritage Sites in Canada will benefit by continuing to promote this brand, particularly in marketing aimed at international audiences.

The World Heritage brand may attract the attention of potential visitors, but there are more than a thousand World Heritage sites around the world from which to choose. While each carries a unique reason for designation, the decision for tourists to visit is also influenced by the promise of an enjoyable and memorable experience. Sites that facilitate opportunities for experiencing the unique characteristics of the protected heritage place will create a special niche in the marketplace, which in turn will reinforce the promise, or brand, of that location.

#### 4. CREATING A VISION

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Good people and adequate financial support are core to the operations of Canada's World Heritage Sites. But an inspiring vision sets the course. A clear vision enables the setting of goals and guides investments in marketing, visitor experience and supporting infrastructure, all with an eye to ensuring consistency and smart investment choices. An inspiring vision backed by strong leadership helps to galvanize the efforts of stakeholders including staff, non-profit groups, private sector, and the community; helps solicit financial contributions from funders; and promotes a regulatory environment consistent with tourism goals. Vision and leadership also support and facilitate the local destination area to develop local tourism product consistent with the World Heritage Site brand, helping to grow a dynamic regional tourism economy.

#### 5. DIVERSIFYING THE EXPERIENCE

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The more diverse and wide-ranging the opportunities for experiencing a World Heritage Site and its environs, the greater the attraction power for visitors. Most of the World Heritage Sites in Canada are located in rural areas, some of them very remote, with sparse populations and limited infrastructure. For many visitors, the iconic status, authenticity and remote nature of the World Heritage Site constitute the very draw of the place and little infrastructure is required. For the rest of us, a critical mass of activities and services at the site and/or in the destination area may help to justify the investment of time and expense of travelling there. It is important, however, to ensure that the added programs and activities take into account and respect the authentic values of the site.

Through their star power, World Heritage Sites in Canada are well placed to be local economic drivers; the more remote the location, the more important their role in attracting tourists. These sites have an opportunity to demonstrate leadership by joining efforts with the community and private sector to develop a critical mass of attractions and services to entice travellers to the region. For example, strategically timed festivals and events stretch the season, as seen at Gros Morne NP where Park and communities have collaborated to create a strong tourism draw. Working with the travel trade to produce touring packages aimed at target clientele is another important tactic for attracting visitors to the region.

## 6. INVESTING IN INFRASTRUCTURE

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Infrastructure is not the reason to visit a World Heritage Site, however it can facilitate interactions with the heritage values of the site. Though infrastructure is largely taken for granted by the visitor, it nevertheless comprises a basic component of the overall experience. For example, roads, campgrounds, docks, toilets, visitor centres, dining and lodging facilities, shelters, and picnic benches all support a range of uses by the visitor. Insufficient, degraded or poorly maintained facilities and transportation networks will detract from the experience of the protected heritage place.

Infrastructure can be very costly to build and to maintain so it's important to have clear objectives that correspond to visitor need. Parks Canada, for example, introduced hard-sided tents (O'Tentiks) to accommodate the changing tastes of campers, and Wi-Fi connectivity is now considered a basic service requirement of tourism attractions. By matching the nature of the infrastructure to target audiences and market trends, Canada's World Heritage Sites will go far to ensuring their dollars are invested wisely.

## 7. RAISING AWARENESS THROUGH MARKETING

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The UNESCO designation may be a powerful brand, but for people to visit one of Canada's World Heritage Sites it helps first to know something about it. A clearly defined value proposition – “why you should visit” - will both help to streamline marketing messages and position the site in the minds of different audiences. Marketing takes many forms - web sites, trip-planning tools, print and electronic media, even signage – and is more effective when the approach is consistent across all platforms. Clear and expressive messaging, supported by evocative images, will unify the efforts of marketing agencies from the local to the provincial to the national level. It will make it easier for the province to feature the World Heritage Site as a prime destination and will also help to catch the attention of the travel trade.

## 8. TAKING SOCIAL MEDIA SERIOUSLY

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Social media and mobile technology are powerful forces in today's society and the tourism industry is taking steps to embed these tools in their operations. Social media is key to creating awareness, particularly with the Millennial generation, and to building and sustaining customer relationships before, during and after the visit, helping to entice repeat visits. No advertising is more powerful than word-of-mouth and social media is a potent platform for spreading the word. The use of mobile technology in programming and interpretation can offer new and innovative experiences to visitors, as well as to audiences who are unable to visit the site.

Realizing the potential of social media entails an understanding of the ever-changing channels available and their relevance for the site and target markets. It also means actively engaging with audiences - listening to what they are interested in, paying attention to customer reviews, and responding accordingly. By engaging with audiences through social media, Canada's World Heritage Sites will be better able to maintain their relevance now and into the future.

## 9. INVOLVING THE PRIVATE SECTOR

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With limited budgets and resources, World Heritage Sites can benefit from partnerships with and the support of the private sector. Third-party operators can provide services and facilities to enhance and diversify the visitor experience, stretch the season and help attract visitors to the site. The private sector can be contracted to deliver existing dining, accommodation, transportation, or other services. It can also be invited to submit proposals for new and innovative activities, programs, events and services that are compatible with the vision of the site and match target-audience needs. Here, the site must ensure that the necessary regulatory environment and service delivery standards are in place to accommodate this private sector investment.

In the destination area, World Heritage Sites can support the efforts of the private sector to offer products, services and amenities that help build critical mass and attract and retain tourists in the region. This may involve helping to train and build the capacity of small business operators. It may also require financial support or incentives in the early years to support the fledgling operations as they gain traction in the marketplace.

## 10. COLLABORATING WITH COMMUNITIES, FRIENDS ASSOCIATIONS AND FIRST NATIONS GROUPS

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Through their mandates to preserve our world heritage, World Heritage Sites are regarded as positive forces in our society and that brings them friends and supporters. Canada's sites have the opportunity to harness this support not just for the benefit of conservation efforts but for the visitor experience of the site and for the benefit of local economies. By reaching out to and building relationships with local, regional, provincial and federal stakeholders, Canada's World Heritage Sites can generate a broad base of support. Strong community relationships can secure the action of supporters to advocate on behalf of the site's natural or cultural integrity. The tourism experience is enhanced by fundraising and other support provided by Friends associations to augment activities and services at the site and in the surrounding area. And the involvement of local First Nations peoples in program delivery or off-site services can enrich the experience of visitors as well as benefit local communities.

Canada's World Heritage Sites have the potential to enhance the economic welfare of the destination area by drawing visitors to the area; the smaller the community the more important the role of the site in attracting visitors. Beyond providing employment to local residents, the site can show leadership in collaborating with the community to realize a tourism vision and to help build the capacity of local entrepreneurs as small-business operators.



# APPENDICES

- I      Acronyms and Definitions**
- II     Summary of Key Information on World Heritage Sites: Canada, Australia and United States**
- III    List of Sites Eliminated from Consideration for the Case Studies and Reasons for their Elimination**
- IV    Comparative Details on the Eight Case Study World Heritage Sites**
- V     Bibliography**

# APPENDIX I: LIST OF ACRONYMS

The following is a list of acronyms frequently used in this report:

- AB: Alberta
- AU: Australia
- CAN: Canada
- DMO: Destination Marketing Organization (could be a state/province, region or country-based organization)
- EQ: Explorer Quotient, a market-research based initiative of Destination Canada that segments markets according to the type of traveller they are.
- HA: Hectare
- N&L: Newfoundland and Labrador
- NP: National Park
- NPS: National Parks Service of the United States
- NWT: Northwest Territories
- RTO: Regional Tourism Organizations
- US: United States
- WHS: World Heritage Site
- 4WD: Four wheel drive

<b>Appendix II</b> <b>Summary of Key Information on World Heritage Sites: Canada, Australia and United States</b>							
<b>Country &amp; Sites</b>	<b>Type &amp; Year of Inscription</b>	<b>Location</b>	<b>Key Activities</b>	<b>Ownership &amp; Management</b>	<b>Attendance &amp; Visitor Origins</b>	<b>Within 200 km of Major City</b>	<b>Significant Attractions Nearby</b>
<b>CANADA</b>							
<b>Head-Smashed-In Buffalo Jump, AB</b>	Cultural 1981	Rural	Interpretive Centre	Prov'l Gov	60,000 ~ 50% out of province	Yes	No
<b>Historic District of Old Québec, QC</b>	Cultural 1985	Urban	Viewing built heritage, historic sites	Fed. Gov. Prov'l Gov. Municipality	5 million ~ 30% out of province	Yes	Yes
<b>Landscape of Grand Pré, NS</b>	Cultural 2012	Rural	Viewing natural landscape, NHS – interpretive programs	Fed. Gov. Prov'l Gov. Municipality, NFP	25,000 (NHS only) ~ 75% outside Atlantic Canada	Yes	Yes
<b>L'Anse aux Meadows NHS, NL</b>	Cultural 1978	Rural	Living history interpretation; learning	Fed. Gov.	22,000 ~75% out of province	No	No
<b>Old Town Lunenburg, NS</b>	Cultural 1995	Urban	Viewing built heritage	Prov'l Gov. Municipality	~300,000 out of province	Yes	Yes
<b>Red Bay Basque Whaling Station, NL</b>	Cultural 2013	Rural	Heritage interpretation, learning	Fed. Gov.	~7,500 ~75% out of province	No	No
<b>Rideau Canal, ON</b>	Cultural 2007	Rural & Urban	Viewing built heritage, camping, fishing, viewing landscapes	Fed. Gov.	~920,000 (land-based) ~20% international	Yes	Yes
<b>S'Gang Gwaay, BC</b>	Cultural 1981	Remote	First Nations Culture	First Nation Fed. Gov.	1,700 No origins	No	No
<b>Canadian Rocky Mountain Parks, BC</b>	Natural 1984	Rural	Outdoor activities; wildlife viewing, tours, learning	Fed. Gov. Prov'l Gov.	Banff: 3.3 million; 50% international Jasper 2.1 million	Yes	Yes
<b>Dinosaur Provincial Park,</b>	Natural 1979	Rural	Interpretive Centre - Fossils	Prov'l Gov.	~90,000 day visitors & campers	No (Calgary 220 km)	No

<b>Appendix II</b> <b>Summary of Key Information on World Heritage Sites: Canada, Australia and United States</b>							
<b>Country &amp; Sites</b>	<b>Type &amp; Year of Inscription</b>	<b>Location</b>	<b>Key Activities</b>	<b>Ownership &amp; Management</b>	<b>Attendance &amp; Visitor Origins</b>	<b>Within 200 km of Major City</b>	<b>Significant Attractions Nearby</b>
<b>AB</b>					85% Canadian		
<b>Gros Morne National Park, NL</b>	Natural 1987	Rural	Outdoor activities, summer & winter; wildlife viewing, learning; geology	Fed. Gov.	193,000 27% Atlantic Canada; 51% Other Canada; 19% International	No	Yes
<b>Joggins Fossil Cliffs, NS</b>	Natural 2008	Rural	Interpretive centre – Fossils; guided tours	Not-for-Profit	11,000 pd. Mostly out of province	Yes	No
<b>Kluane/Wrangell-St. Elias/Glacier Bay/Tatshenshini-Alesk, BC</b>	Natural 1979	Rural – but remote	Outdoor activities, summer and limited winter	Fed. Gov. Prov'l Gov.	~33,000 @ Kluane See US for other sites No origin data	No	No
<b>Miguasha National Park, QC</b>	Natural 1999	Rural	Interpretive centre - Fossils	Prov'l Gov.	~15,000 No origin data	No	No
<b>Nahanni National Park, NWT</b>	Natural 1978	Remote	Outdoor activities; summer	Fed. Gov.	~750 No origin data – mostly tourists	No	No
<b>Waterton Glacier International Peace Park, AB</b>	Natural 1995	Rural	Outdoor activities, summer; wildlife viewing	Fed.Gov.	405,000 @Waterton 64% Canada; 27% US; 9% Overseas	No (Calgary 260 km)	No
<b>Wood Buffalo National Park, AB/NWT</b>	Natural 1983	Rural – but Remote	Outdoor activities; summer and limited winter	Fed. Gov.	~2,000 78% Canada; 22% international	No	No
<b>AUSTRALIA</b>							
<b>Australian Convict Sites (11)</b>	Cultural 2010	Urban, Rural, one remote	Historic sites	State Gov., Trust	No data available	Yes – some sites	Yes – some sites

<b>Appendix II</b> <b>Summary of Key Information on World Heritage Sites: Canada, Australia and United States</b>							
<b>Country &amp; Sites</b>	<b>Type &amp; Year of Inscription</b>	<b>Location</b>	<b>Key Activities</b>	<b>Ownership &amp; Management</b>	<b>Attendance &amp; Visitor Origins</b>	<b>Within 200 km of Major City</b>	<b>Significant Attractions Nearby</b>
<b>Royal Exhibition Building &amp; Carlton Gardens</b>	Cultural 2004	Urban	Iconic architecture, wildlife	State Gov.	300,000 High resident visits	Yes	Yes
<b>Sydney Opera House</b>	Cultural 2007	Urban	Concerts, tours, iconic architecture	State Gov./Agency	2,200,000 High resident visits	Yes	Yes
<b>Australian Fossil Mammal Sites (2)</b>	Natural 1994	Rural	Interpretive Centre – Fossils; hiking	State Gov. Indigenous People	40,000 High tourist visits	No	Yes
<b>Fraser Island</b>	Natural 1992	Remote	Outdoor activities, wildlife viewing	Indigenous People Fed. Gov. State Gov.	350,000	No	Yes
<b>Gondawana Rainforests of Australia (41)</b>	Natural 1986	Rural	Hiking; wildlife viewing	Fed. Gov. State Gov. Indigenous People	2,000,000 High resident visits	No	No
<b>Great Barrier Reef</b>	Natural 1981	Remote	Outdoor water-based activities	Fed Gov.	1,500,000 High tourist visits	Yes	No
<b>Greater Blue Mountains Area</b>	Natural 2000	Rural	Hiking; wildlife viewing	State Gov.	1,000,000 High resident visits	Yes	Yes
<b>Heard &amp; McDonald Islands</b>	Natural 1997	Remote (not open to public)	Scientific access only	Fed Gov.	No public visits	No	No
<b>Lord Howe Island Group</b>	Natural 1982	Remote	Outdoor activities	State Gov.	32,000 High tourist visits	No	No
<b>Macquarie Island</b>	Natural 1997	Remote	Wildlife viewing (seals, penguins)	Fed Gov.	No data High tourist visits	No	No
<b>Ningaloo Coast</b>	Natural 2011	Remote/Rural	Outdoor water-based activities, wildlife viewing (whales)	Fed Gov. State Gov.	No data	No	No

<b>Appendix II</b> <b>Summary of Key Information on World Heritage Sites: Canada, Australia and United States</b>							
<b>Country &amp; Sites</b>	<b>Type &amp; Year of Inscription</b>	<b>Location</b>	<b>Key Activities</b>	<b>Ownership &amp; Management</b>	<b>Attendance &amp; Visitor Origins</b>	<b>Within 200 km of Major City</b>	<b>Significant Attractions Nearby</b>
<b>Purnululu National Park</b>	Natural 2003	Remote/Rural	Hiking, geology	State Gov.	25,000	No	No
<b>Shark Bay, Western AU</b>	Natural 1991	Rural	Discovery Centre; water activities; wildlife viewing - dolphins	State Gov.	100,000	No	No
<b>Wet Tropics of Queensland</b>	Natural 1988	Rural	Hiking, wildlife viewing	Private State Gov.	2,000,000 High resident visits	Yes	Yes
<b>Kakadu National Park</b>	Natural/Cultural 1981	Rural	Outdoor activities, cultural interpretive centres	Fed. Gov. Indigenous People.	500,000 High resident visits	Yes	No
<b>Tasmanian Wilderness</b>	Natural/Cultural 1982	Rural	Outdoor activities, wildlife viewing	Fed Gov. State Gov.	No data	Yes	Yes
<b>Uluru-Kata Tjuta National Park</b>	Natural/ Cultural 1987	Rural	Outdoor activities, cultural interpretive centres	Fed Gov. Indigenous People.	400,000 High tourist visits	No	No
<b>Willandra Lakes Region</b>	Natural/ Cultural 1981	Rural	Hiking, unique land forms	State Gov.	35,000 (Mungo NP)	No	No
<b>UNITED STATES</b>							
<b>Cahokia Mounds State Historic Site</b>	Cultural 1982	Rural	Interpretive Centre; First Nations culture	State Gov./Agency	1,000,000 High tourist visits	Yes	Yes
<b>Chaco Culture</b>	Cultural 1987	Rural	Outdoor activities; First Nations culture	Fed. Gov.	60,000 High tourist visits	No (250 km)	Yes
<b>Independence Hall</b>	Cultural 1979	Urban	Interpretive Centre, heritage site	Municipality Fed. Gov.	600,000	Yes	Yes

<b>Appendix II</b> <b>Summary of Key Information on World Heritage Sites: Canada, Australia and United States</b>							
<b>Country &amp; Sites</b>	<b>Type &amp; Year of Inscription</b>	<b>Location</b>	<b>Key Activities</b>	<b>Ownership &amp; Management</b>	<b>Attendance &amp; Visitor Origins</b>	<b>Within 200 km of Major City</b>	<b>Significant Attractions Nearby</b>
<b>La Fortaleza and San Juan National Historic Site in Puerto Rico</b>	Cultural 1983	Urban	Viewing built heritage; Interpretive Centre	State Gov. Fed Gov.	2,000,000	Yes	Yes
<b>Mesa Verde National Park</b>	Cultural 1978	Rural	Hiking; First Nation sites	Fed Gov.	500,000	No	Yes
<b>Monticello and the University of Virginia in Charlottesville</b>	Cultural 1987	Urban	Viewing built heritage;	University; Private Foundation	312,000 Monticello 100,000 University of Virginia	Yes	Yes
<b>Monumental Earthworks of Poverty Point</b>	Cultural 2014	Rural	Hiking, Interpretive Centre; First Nations sites	State Gov.	No data available	Yes	Yes
<b>Statue of Liberty</b>	Cultural 1984	Urban	Viewing built heritage/iconic architecture	Fed Gov.	3,200,000 High tourist visits	Yes	Yes
<b>Taos Pueblo</b>	Cultural 1992	Rural	Living settlement; First Nations culture	Community	3,000,000 High tourist visits	Yes	Yes
<b>Carlsbad Caverns National Park</b>	Natural 1995	Rural	Hiking in cave tunnels; wildlife viewing (bats)	Fed Gov.	~400,000 High tourist visits	No	No
<b>Everglades National Park</b>	Natural 1979	Rural	Outdoor activities, wildlife viewing	Fed Gov.	1,100,000	Yes	Yes
<b>Grand Canyon National Park</b>	Natural 1979	Rural	Viewing landscapes; hiking, rafting	Fed.Gov.	4,700,000	Yes	Not close
<b>Great Smokey Mountains National Park</b>	Natural 1983	Rural	Outdoor activities	Fed Gov.	10,000,000 High resident visits	Yes	Yes



<b>Appendix II</b> <b>Summary of Key Information on World Heritage Sites: Canada, Australia and United States</b>							
<b>Country &amp; Sites</b>	<b>Type &amp; Year of Inscription</b>	<b>Location</b>	<b>Key Activities</b>	<b>Ownership &amp; Management</b>	<b>Attendance &amp; Visitor Origins</b>	<b>Within 200 km of Major City</b>	<b>Significant Attractions Nearby</b>
<b>Hawaii Volcanoes National Park</b>	Natural 1987	Rural	Outdoor activities; geology; Interpretive Centre	Fed Gov.	1,700,000	Yes	Yes
<b>Kluane/Wrangell-St. Elias/Glacier Bay/Tatshenshini-Alsek</b>	Natural 1979	Part Rural, Part Remote	Outdoor activities – land-based; water based also at remote site; wildlife viewing	Fed. Gov.	Rural area: 75,000 Remote: 500,000 – largely cruise ship High tourist visits	No	No
<b>Mammoth Cave National Park</b>	Natural 1981	Rural	Cave viewing	Fed. Gov.	522,000 High tourist visits	Yes	Yes
<b>Olympic National Park</b>	Natural 1981	Rural	Outdoor activities; viewing landscapes	Fed. Gov.	3,240,000 High resident visits	Yes	Yes
<b>Redwood National and State Parks</b>	Natural 1980	Rural	Hiking; viewing landscapes	Fed. Gov. State Gov.	429,000 High resident visits	No	No
<b>Waterton Glacier International Peace Park</b>	Natural 1995	Rural	Outdoor activities	Fed Gov.	2,339,000 Glacier NP	No	No
<b>Yellowstone National Park</b>	Natural 1978	Rural	Interpretive Centres; wildlife viewing; unique natural features	Fed Gov.	3,500,000	Yes	Yes
<b>Yosemite National Park</b>	Natural 1978	Rural	Outdoor activities	Fed.Gov.	~4,000,000 75% US (62% California); 25% international	Yes	Not close
<b>Papahānaumokuākea</b>	Natural/ Cultural 2010	Remote	N/A	Fed. Gov.	Zero	No	No

Appendix III					
List of Sites Eliminated from Consideration for Case Studies and Reasons for their Elimination					
Eliminated Sites	WHS Designation 2010 or later	Not Publicly Accessible or No Visitors	Very Different or Unusual	National or International Icons	Incorporated within other Destination areas
<b>Canada</b>					
Rocky Mountain Parks			★	★	
Historic District of Old Québec					★
Red Bay Basque Whaling Station	★				
Landscape of Grand Pré	★				
Old Town Lunenburg					★
Rideau Canal					★
<b>Australia</b>					
Australian Convict Sites	★		★		
Sydney Opera House			★	★	
Royal Exhibition Building & Carlton Gardens			★		
Ningaloo Coast	★				
Gondawana Rainforests of Australia			★		
Great Barrier Reef				★	
Heard & McDonald Islands		★			
Uluru-Kata Tjuta National Park (Ayers Rock)				★	
<b>United States</b>					
Independence Hall			★		
Statue of Liberty			★		
La Fortaleza and San Juan National Historic Site, Puerto Rico					★
Monticello and the University of Virginia in Charlottesville			★		
Monumental Earthworks of Poverty Point	★	★			
Carlsbad Caverns National Park			★		
Mammoth Cave National Park			★		
Papahānaumokuāea	★				

**Appendix IV- Part 1**  
**Comparative Details on the Eight Case Study World Heritage Sites**

	<b>Gros Morne National Park, CAN</b>	<b>Hawaii Volcanoes National Park, US</b>	<b>Kakadu National Park, AU</b>
<b>Type of Site &amp; Size</b>	Natural 180,500 ha	Natural 87,940 ha	Natural and cultural 1.98 million ha
<b>Year of Inscription &amp; Key Reasons</b>	1987 Geological features (plate tectonics) & outstanding natural beauty	1987 Geological values (two active volcanoes illustrate island-building) and ecological values (5 major ecosystems; endangered species); also archaeological remains; also a sacred traditional cultural site.	1981 Natural values (at the intersection of four bioregions; diverse environment and species) and cultural values (thousands of rock art sites record Aboriginal life over millennia)
<b>Location</b>	Newfoundland & Labrador 35 km from Deer Lake Airport with direct service from major urban centres; connecting service from international origins. 8 small communities with visitor infrastructure are adjacent to the park.	Big Island, Hawaii 150 km from Kona (int'l airport; prime tourism area); 60 km from Hilo with secondary airport, cruise port & some visitor infrastructure. Small community (Volcano Village) adjacent with smaller scale accommodation, food service, artisans.	Top End of the Northern Territory, Australia 150 km from Darwin (int'l airport, territorial capital). Smaller centres close to park provide services. Kakadu is home to Bininj/Mungguy Indigenous peoples and town of Jabiru.
<b>Prime Owner/ Operator</b>	Parks Canada (federal government)	U.S. National Parks Service (NPS) (federal government)	Parks Australia (federal government) and Binini/Mungguy Indigenous people.
<b>Other Organizations Involved</b>	Gros Morne Cooperating Association (non-profit) runs gift shops, pool	Hawaii Parks Pacific Association (non-profit; for all NPS sites in Hawaii) operates 2 book stores, publishes some guides Friends of Hawaii Volcanoes National Park (non-profit) raises money for and delivers Park Ranger Youth Program; also offers customized tours & learning programs; coordinates volunteer efforts in the park; runs cultural programs at on-site hotel	Bininj/Mungguy Indigenous people are the Traditional Owners of park and co-manage with Parks Australia through formal agreements.
<b>Private Sector Involvement within Park</b>	Operate boat tours under concession arrangement. Others offer guided adventure experiences in the park but there are no formal arrangements.	Operate Volcano House Hotel & Camper Cabins. Tour & adventure operators run guided tours in park.	Operate camping, lodging and dining facilities, and a diversity of tours (boat, fishing, safari, bushwalking, and cultural tours - over 100 permits and 32 licences issued to commercial operators in 2014.)

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**Comparative Details on the Eight Case Study World Heritage Sites**

	<b>Gros Morne National Park, CAN</b>	<b>Hawaii Volcanoes National Park, US</b>	<b>Kakadu National Park, AU</b>
<b>Core &amp; Unique Customer Experiences</b>	<p>Scenery illustrates layers of time; Walk on the Earth's Mantle Hiking, kayaking, view wildlife, camping (tent, trailer and camping cabins), scenery, boat tours up inland fjord.</p> <p>Heritage sites &amp; Interpretive centre. Guided outdoor &amp; cultural adventures. Winter outdoor activities Artist-in-residence program</p>	<p>Home to the world's most active and continuously erupting, &amp; 'drive-in' volcano – Kilauea; second volcano is more remote but also regularly active. See, hear &amp; smell active lava flows; particularly popular at night.</p> <p>Hiking trails – on lava field; through rainforests; deserts, guided &amp; self-guided; cycling; scenic driving tour; cultural experiences. Stay on-site – hotel, camping</p>	<p>"A 50,000 year old living cultural landscape that interacts with nature and the seasons". Explore rock art; experience the diverse environment through boating, fishing, safaris, bushwalking. Interact with Indigenous interpreters and commercial operators. Camping and roofed accommodation, interpretive exhibits in visitor centres.</p>
<b>Visitation &amp; Trends</b>	<p>2013/14 – 193,000 person visits; up from 100,000 in 1992 (though some of this due to counting methodology). Park is open all year but with limited winter activities; core operating season is mid-May through mid-October.</p> <p>22% are international; 59% from other Canada; 19% in-province Average 3.6 day stay in the Park; plus similar stay in the region. Highest visitation in the region. 81% first time visitors.</p>	<p>2013/14- almost 1.7 million; increasing steadily since 2009 Jumps/peaks when volcano is active. A major reason for visits to the Big Island; factor in visits to Hawaii especially when volcano is active. Approx. 65% mainland US; 14% Japan; 7% Canada. Admission fee gives 7 day access so person visits could be much higher. Site is open 24 hours a day, 7 days a week all year although there is no staff on duty from 10 pm to 5 am. Visitation is well-distributed throughout the year with a peak in winter months, unless there is volcanic activity which causes a jump in attendance.</p>	<p>2013 – 200,000. This is a decline from 2009 and earlier, which mirrors a decline in Australian tourism per economic downturn. Open year-round. About 40% visit park with commercial tour operators. Last survey in 2000-01 showed even distribution between domestic and international visitors; and a younger demographic than to the region in general. International visitors tend to visit in rainy season which coincides with northern winter, but offers less than ideal conditions with some park areas closed to flooding.</p> <p>81% first-time visitors.</p>
<b>Visitor &amp; Market Research</b>	<p>Regular Visitor Surveys &amp; Visitor Satisfaction research Research into visitor psychographics &amp; interests (EQ) used to develop &amp; refine visitor experiences</p>	<p>Limited Small visitor satisfaction survey; Rely on data for tourism to Big Island overall. Economic impact analysis by US National Parks Service</p>	<p>Last major survey in 2000-01, but attendance statistics are regularly captured. Per Tourism Australia's market segmentation, the Experience Seeker has been identified as Kakadu's target audience.</p>

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**Comparative Details on the Eight Case Study World Heritage Sites**

	<b>Gros Morne National Park, CAN</b>	<b>Hawaii Volcanoes National Park, US</b>	<b>Kakadu National Park, AU</b>
<b>Economic Impacts</b>	Total visitor spending in 2009 estimated at \$37.6 million; \$27 million from out-of-province visitors	\$137 million in visitor spending attributed to HVNP in 2014 (NPS study)	\$15 million AU to the regional economy in 2007 with an average daily spend of \$126 and average 2.8 nights in region.
<b>Operating Budget &amp; Sources</b>	Salaries \$4.9 million Goods & Services \$1.4 million In addition, the site uses services (finance, HR, etc.) from the Field Unit office, the costs of which are not included above. Budget from Government of Canada.  Earned revenue from the site is combined with that from other sites in the field unit and distributed among the 4 sites.	Total varies - \$~10 million to \$13 million+ depending on projects. US Congress allocation: \$7 million 80% of on-site revenues (\$2.4 million) are retained by site Apply for other funds/grants for special projects through other Federal agencies & National Park Foundation Significant volunteer (40,000 – 50,000 hours/year) support through & youth ranger program through Friends associations	2014: \$22 million AU operating and \$2.5 million capital expenditures, provided by Australian government. Salaries unavailable. Revenue of \$3.5 million.
<b>Destination Area</b>	23% of all visitors to NL went to Gros Morne region in 2011.  Local communities host extensive array of cultural & learning experiences, festivals all of which help to extend stay and season.  Gros Morne Cooperating Association has been key to developing and fostering these experiences.  Two other WHS (Red Bay & L'Anse au Meadows) are located in western NL.	Small 'artist' village (Volcano Village) adjacent with some accommodation (B&B, small properties)  Hilo has air service, cruise port.  Most visitors stay 150km away and drive 3 hours to see site.  HVNP sees most of the visitors to Big Island.  Wide range of outdoor adventure experiences throughout the area	Top end of Northern Territory has the largest Indigenous population in Australia. Main centre is Darwin, the capital, on ocean. Alice Springs also in Northern Territory, a large destination draw.  Landscape is diverse with many touring opportunities. Climate is hot with a pronounced rainy season.
<b>Marketing – Key Agencies; Positioning in Destination</b>	Parks Canada; Provincial Tourism; Regional DMO & Gros Morne Cooperating Association (GMCA) are all actively involved.	NPS does not do 'marketing' per se – do not advertise individual national parks because their primary mandate is education not revenue generation or audience growth;	Tourism is an economic priority for Australia and government invests in tourism research and marketing at all levels. Kakadu is prioritized as an iconic Australian destination.

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**Comparative Details on the Eight Case Study World Heritage Sites**

	<b>Gros Morne National Park, CAN</b>	<b>Hawaii Volcanoes National Park, US</b>	<b>Kakadu National Park, AU</b>
	<p>GMNP is a provincial tourism icon and gets significant coverage in their marketing efforts; similar images are consistently used in promotional efforts at nat'l, prov'l, regional marketing efforts. N&amp;L Tourism profile and marketing of the site has been very important to its success.</p> <p>Parks Canada does media relations, participates in FAMS, and attends trade &amp; consumer shows; GMNP website provides basic information, trip planning, PDF of brochure, links to other tourism web sites.</p> <p>Site is a significant factor in attracting visitors to the province; and key demand-generator for Western NL.</p>	<p>HVNP has a website that provides trip planning information; also do PR and media relations.</p> <p>Big Island Visitor &amp; Convention Bureau (BIVCB) profile HVNP extensively in their marketing efforts – it is the one thing that separates them from the other islands; Hawaii Tourism Authority also features it as an asset.</p> <p>BIVCB shifting to social media approach – from a public relations perspective; using influencers to get the message out; HVNP is a strong asset for this particularly when volcano is active.</p>	<p>Represents the Northern Territory in the National Landscape program, a major marketing initiative by Tourism Australia to attract international travellers.</p> <p>Is a key driver of tourism to the Top End of Australia and the 'face' of the Northern Territory DMO.</p> <p>Is popular with commercial photographers, film makers and researchers who publicize indirectly.</p> <p>Developed a site-specific Tourism Plan in 2009, which includes marketing strategies.</p> <p>Has a well-designed, user friendly website aimed at first-time visitors.</p>
<b>Social Media Presence</b>	<p>Parks Canada N&amp;L has Twitter site (4000 followers); covers all sites; FB, Twitter, YouTube, Flickr active presence through Gros Morne Cooperating Association-related sites such as Visit Gros Morne.</p>	<p>HVNP very active on FB (68,000 friends; &amp; Twitter (4,300 followers); multi-posts daily and multi-conversations.</p> <p>Important method to get out info on park conditions, volcanic activity, programs &amp; events.</p>	<p>Active on all social media channels, which managed centrally by Parks Australia. Kakadu shares the Facebook page with the other national parks.</p>
<b>Use of WHS Brand &amp; Positioning</b>	<p>No site specific brand although Parks Canada has guidelines on language, colours, etc. Website and visitor guide indicate WHS status.</p> <p>Marketing materials of province and partner agencies often speak to WHS designation.</p>	<p>No site brand; limited use of WHS brand.</p>	<p>Adopted a new logo and brand identity in 2008 - "Kakadu is a 50, 000-year-old living cultural landscape that interacts with nature and the seasons..."</p> <p>Positioned as an ancient Indigenous culture living in a diverse, species-rich environment inviting visitor exploration.</p> <p>WHS status is core to the identity of the Park and is broadly marketed by all stakeholders.</p>

**Appendix IV- Part 2**  
**Comparative Details on the Eight Case Study World Heritage Sites**

	<b>Head-Smashed-In Buffalo Jump, CAN</b>	<b>Mesa Verde National Park, US</b>
<b>Type of Site &amp; Size</b>	Cultural 4,000 ha	Cultural 21,043 ha
<b>Year of Inscription &amp; Key Reasons</b>	1981 One of the oldest, most extensive and best-preserved sites illustrating communal hunting techniques and the way of life of Plains people	1978 Ancestral Pueblo Indian dwellings on the Mesa Verde plateau provides insights into the ancient cultural traditions spanning 700 years; includes almost 5,000 archaeological sites and 600 cliff dwellings.
<b>Location</b>	Located in southwest Alberta, 180 km from Calgary and international airport. Closest community is Fort Macleod, 45 km; Lethbridge is 70 km east	Located in southwest Colorado at Four Corners - the intersection of Colorado Arizona, Utah & New Mexico. Closest town with air service is Cortez, Colorado (21 miles) Durango, Colorado (airport) is ~60 miles; Denver is ~ 400 miles.
<b>Prime Owner/ Operator</b>	Province of Alberta Site managed by Alberta Dep't of Cultural & Tourism, Historic Sites & Museums Branch	U.S. National Parks Service (NPS) (federal government). The only Cultural park within the NPS system.
<b>Other Organizations Involved</b>	Infrastructure Alberta maintains building Pincher Creek Historical Society (not-for-profit) provides visitor services under a Service Agreement 75% of staff (full time and seasonal) is from Blackfoot Community	Mesa Verde Museum Association (not-for-profit) runs retail stores & publishing program; sells memberships; runs the Mesa Verde Foundation to raise funds for capital projects
<b>Private Sector Involvement within Park</b>	On-site café leased to private operator.	Food, retail and accommodation concessions including vacation packages, a booking system & some guide services are run by a private operator, Aramark, under contract.
<b>Core &amp; Unique Customer Experiences</b>	Majestic landscape with natural, cultural and spiritual features representing the Blackfoot way of life, specifically a method of hunting. Tour museum displays in interpretive centre with film on buffalo jump & contemporary Blackfoot people. Hike landscape. Experience First Nations culture through First Nations interpretive tours, demonstrations, storytelling, and drum dances.	Discover how Ancestral Puebloans lived in cliff dwellings high in arid Colorado mountains. Tour the dwellings, Interpretive centre, archaeology museum; Interpretive programs offered by Park rangers; artist-in-residence program, lecture series, Hiking (6 in total); scenic touring, cycling. On-site lodge (150 rooms); no on-site camping



**Appendix IV- Part 2**  
**Comparative Details on the Eight Case Study World Heritage Sites**

	<b>Head-Smashed-In Buffalo Jump, CAN</b>	<b>Mesa Verde National Park, US</b>
<b>Visitation &amp; Trends</b>	<p>55,000 – 65,000 in recent years.  Seasonal operation: May-October  Down from 85,000 avg. up to 2003/04 but admission was free in early years with longer operating hours and a local RV campground (now closed).  50% are from outside Alberta – 16% international, 16% US and 17% other Canada. (This compares to 90% Albertan visitation in the surrounding region indicating the site has more limited success attracting in-province markets).  73% first-time visitors</p> <p>Market share is slipping relative to peers.</p>	<p>About 500,000 total;  Summer visitors 80% US; 19% international; more international visitors in shoulder season.  Open year-round but most facilities close in winter.  75% are first-time visitors.  2/3 stayed overnight in park or within 50 miles.  75% spent less than one day in the park; 25% spent an average of 2.1 days.</p>
<b>Visitor &amp; Market Research</b>	<p>Last visitor survey in 2008.  Track origins through postal codes.  Using EQ to identify segments; hoping to broaden appeal to fit better with Alberta Tourism overall positioning</p>	<p>Annual visitor counts  Regular visitor surveys  Economic impact analysis by US National Parks Service</p>
<b>Economic Impacts</b>	<p>Out-of-province visitors spent \$3.5 million in the area in 2008.</p>	<p>\$50 million spent in region by visitors in 2014, creating 740 jobs.  Visitors spend average 2.1 nights in region.</p>
<b>Operating Budget &amp; Sources</b>	<p>\$1.5 million operating.  FT salaries and operating costs covered by provincial government.  Seasonal staff and programming covered by earned revenues managed by Historical Society.</p>	<p>Total budget \$6.2 million  US Congress allocation  About 11% of total is earned revenues.</p> <p>Non-profit friends association raises money to cover retail, publishing and education program costs. A Foundation raises money for special projects.</p>
<b>Destination Area</b>	<p>Limited camping in local area and recent decision re no RVs camping on-site is impacting overnight stays and visitation.  Fort Macleod &amp; Lethbridge offer accommodation and dining.  Several attractions in SW Alberta including Waterton National Park (also a WHS), several historic sites and museums. Dinosaur Provincial Park (also a WHS) &amp; Royal Tyrell Museum are 265km distance</p>	<p>Four Corners Region (only place in US where 4 states meet); rugged and arid area  Rich in aboriginal culture; most of region belongs to Native Americans.  Many attractions available – canyons, tribal parks, state parks although Mesa Verde is the primary attraction in the region; Durango is base for Scenic Railway using vintage cars.  Located near two major driving tours of southwest US.  15% of visitor reported it was their primary trip destination; 56% indicated it was their primary reason for visiting the area.</p>

**Appendix IV- Part 2**  
**Comparative Details on the Eight Case Study World Heritage Sites**

	<b>Head-Smashed-In Buffalo Jump, CAN</b>	<b>Mesa Verde National Park, US</b>
<b>Marketing – Key Agencies; Positioning in Destination</b>	<p>Tourism Alberta has prime marketing responsibility but site has low profile in their material. (However, WHS sites are seen as a draw for long haul cultural explorers)</p> <p>A Destination Canada Signature Experience; and featured in Destination Canada promotion of Aboriginal experiences.</p> <p>Marketing by site and prov'l operating department is very limited.</p> <p>Regional DMO promotes two circle tours that include the site.</p>	<p>NPS does not do 'marketing' per se – do not advertise individual national parks because their primary mandate is education not revenue generation or audience growth.</p> <p>Marketing is provided by the many stakeholder organizations, including friend's association, Foundation, DMO, private-sector hospitality provider.</p> <p>Is the object of several websites called Mesa Verde, each one managed by a different stakeholder. The NPS website blends corporate with tourism information.</p> <p>Regional DMO promotes the park and surrounding region, also Go Colorado (State tourism) and private sector. Is on two iconic SW USA drive tours.</p> <p>No apparent marketing undertaken at the national level.</p>
<b>Social Media Presence</b>	HSIBJ has Facebook (posts on Facebook every couple of days), also Twitter (low followers), has videos posted on YouTube	Mesa Verde NP has many Facebook followers (10,000) on a page managed by the NPS, and posts updates every few days.
<b>Use of WHS Brand &amp; Positioning</b>	<p>No specific brand identity.</p> <p>Positioned as a museum set in a dramatic landscape to learn about and interact with Blackfoot history and culture.</p> <p>WHS brand is very important to the site, particularly in efforts to attract international visitors.</p>	<p>No specific brand identity.</p> <p>Positioned as protected archaeological structures in a dramatic landscape that can be explored to learn about ancient aboriginal ways.</p> <p>WHS designation is not attached to the name of the site in signage, print materials or on the website. Site managers plan to rectify this, though they believe the WHS designation carries far less importance for Americans than for international visitors.</p>

**Appendix IV- Part 3**  
**Comparative Details on the Eight Case Study World Heritage Sites**

	<b>Wood Buffalo National Park, CAN</b>	<b>Purnululu National Park, AU</b>	<b>Willandra Lakes Region, AU</b>
<b>Type of Site &amp; Size</b>	Natural 4,480,000 ha	Natural 239,723 ha	Natural/Cultural 240,000 ha
<b>Year of Inscription &amp; Key Reasons</b>	1983 Ongoing ecological and biological processes encompassing largest undisturbed grass and sedge meadows; world's largest herd of threatened wood bison; also threatened whooping cranes; vast expanses of undisturbed boreal wilderness.	2003 Geological features – banded, beehive shaped towers of cone karst in sandstone creating the Bungle Bungle Range and related geological, biological and climatic phenomena.	1981 Archaeological and geomorphologic features including largely undisturbed sand formations from the Pleistocene Epoch; archaeological evidence of human occupation from 45,000 – 60,000 years ago.
<b>Location</b>	North West Territories/Alberta border 750 km by road from Yellowknife; Fort Smith (2500) is adjacent; has air service. Air access also via Edmonton and Fort McMurray.	Western Australia 300 km south of Kununurra (has air service), 1150 km from Darwin. Accessed via a 52 km dirt road from the Great Northern Highway; requires 4WD vehicle to access.	New South Wales Far western 'outback' region; closest community is on border with State of Victoria, 110 km (with airport; 30,000 population).
<b>Prime Owner/ Operator</b>	Parks Canada (federal government)	Department of Parks and Wildlife of Western Australia (state government)	New South Wales Office of Environment and Heritage (state government) owns Mungo National Park which is within the WHS region and the only part of the WHS that offers any visitor experiences. The rest of the region is privately owned.  Willandra Lakes Region is co-managed <b>and</b> established a ground-breaking consensus process when it created 'Sustaining the Willandra Plan of Management' in 1995 which involved three traditional tribal groups, the community, land owners, scientists and government.

**Appendix IV- Part 3**  
**Comparative Details on the Eight Case Study World Heritage Sites**

	<b>Wood Buffalo National Park, CAN</b>	<b>Purnululu National Park, AU</b>	<b>Willandra Lakes Region, AU</b>
<b>Other Organizations Directly Involved</b>	Currently developing a cooperative management plan with 11 First Nations.	Operated in collaboration with traditional Aboriginal landowners; Federal Government provides some operating funds in support of WHS activities.	At <i>Mungo National Park</i> people from the three tribal traditional landowners deliver Discovery Programs to park visitors.
<b>Private Sector Involvement within Park</b>	One private company licensed to offer guided experiences within the park.	4 private operators have a presence within the park; 3 provide accommodation, some lodge, some camping; 1 provides helicopter tours and transportation into the park. 67 commercial operators are licensed to conduct tourism business within the park.	Private businesses, some Aboriginal, provide guided experiences within the park.
<b>Core &amp; Unique Customer Experiences</b>	Experience remote wilderness area; hiking, camping, paddling, boating and fishing; view wildlife – bison, new pilot proposed for 2015 with several options to see whooping crane (small numbers, fees). Learn about largest inland freshwater delta. Dark Sky Preserve with chance to see Aurora Borealis. Connect with Aboriginal cultural traditions.	Viewing the Bungle Bungle formations on hikes and from the air; photography; observing flora and fauna including 130+ bird species; heli and plane viewing of restricted areas – starting inside or outside the park. Basic camping provided at park run sites or high end lodging with the private operators. Overnight bushwalking.	Visit Mungo National Park and see the ‘Walls of China’ – sand and dune formation stretching for 30 km across dry lake bed; learn about Aboriginal heritage through guided tours; wildlife viewing, camping, hiking, mountain biking.  Reach independently or on coach or adventure tours; private 4 star lodge just outside Mungo Park boundary.  No visitor experiences in the rest of the WHS region other than Mungo.
<b>Visitation &amp; Trends</b>	About 2,000 in 2013/14 (up from less than 1000) but declined to 1,300 in 2014/15 likely due to high fire season in NWT.  78% Canadian (NWT, AB, BC primarily); 12% US; 10% overseas.	Site was discovered in 1983; 17,000 visitors in 1992 up to 28,000 in 2008/09; now around 26,000. Plus those who fly over but do not land (in the thousands).	Approximately 35,000 per year (solid visitor stats are not available); has declined somewhat in past five years due to lack of destination marketing, massive road closures due to environmental issues and competition from other sites.

**Appendix IV- Part 3**  
**Comparative Details on the Eight Case Study World Heritage Sites**

	<b>Wood Buffalo National Park, CAN</b>	<b>Purnululu National Park, AU</b>	<b>Willandra Lakes Region, AU</b>
	Park is technically open all year round (and visitor centres open all year); core operating season is June through September.	No specific data on origins; international visitors estimated at about 50%, most of whom are clients of the private operators.	3% - 6% international tourists; 55% - 65% domestic tourists; balance from within State (early 2000s)
<b>Visitor &amp; Market Research</b>	Visitor surveys (last was 2011); visitor satisfaction survey; working on using EQ tools to define future visitor experiences.	Limited visitor surveys around satisfaction; no other site specific visitor research.	Limited visitor survey data from small samples; nothing appears to be done on a regular basis.  Most of visitors are Australians, very few high yield fly-I to Mungo Lodge; not seen as remote enough to attract international markets looking for “authentic outback wilderness experience”
<b>Economic Impacts</b>	No economic impact data available.	No economic impact data; However, site gets about 10% of visitors to the region; tourism expenditures in the region are estimated at \$276 million (2009)	No economic impact data for the site.  The Murray Region had 20,000 international overnight visitors in 2014, spending \$7 million AU; and over 1 million Australian tourists spending \$15.3 AU.
<b>Operating Budget &amp; Sources</b>	\$1.6 million total for the Park plus support from Field Unit staff in areas such as finance, human resources.  Government of Canada; small amount of earned revenue.	\$700,000 AU core budget plus \$240,000 from Federal government to support WHS activities.  Admission fees and fees from private operators as well.	No information available.
<b>Destination Area Characteristics</b>	NWT overall has 92,000 visitors; 60%+ are leisure; growing Japanese and Chinese coming for northern lights; WBNP not seen as the main draw – people are coming to experience the north; Fort Smith area has variety of smaller attractions and visitor infrastructure.	Kimberley Region is at extreme north of Western Australia; bordered by Indian Ocean; primarily outdoor destinations and coastal sites but all at least 5 hours from Purnululu; Site is the primary attraction in the region, which gets some 290,000 visitors a year (19% international, 47% out of state Australians). Some basic	Located in The Murray Region, an outback area with some 2.4 million day and overnight trips in total.  Primarily outdoor adventure and touring activities.  Mungo Lodge is a 4 star authentic outback

**Appendix IV- Part 3**  
**Comparative Details on the Eight Case Study World Heritage Sites**

	<b>Wood Buffalo National Park, CAN</b>	<b>Purnululu National Park, AU</b>	<b>Willandra Lakes Region, AU</b>
	WHS designation not seen as a feature that draws visitors though it is mentioned in provincial marketing materials.	infrastructure (accommodations, food) at intersection of Park road and Great Northern Highway; travellers can take guided tour from here.	property near the park; has private air strip and attracts limited international markets. (property was previously a 3 star and this is apparently more appropriate positioning for the site)
<b>Marketing – Key Agencies; Positioning in Destination</b>	<p>Parks Canada does general awareness promotion; website with trip planning information. Site is highlighted in marketing of NWT Tourism although not as a prime feature of the destination. (Big focus is on Aurora Borealis); limited exposure through Alberta Tourism.</p> <p>Also featured in Fort McMurray DMO marketing.</p>	<p>Regional Tourism group (to domestic audiences, trip planning),</p> <p>Western Australia Tourism and Federal Tourism agencies promotes Purnululu to international markets; Often featured as a top-class, iconic remote Australian destination.</p> <p>WHS designation is actively used in all marketing materials.</p>	<p>Region in which park is located does not see a lot of destination marketing from state/federal organizations; gets limited visitation and not a priority for attention.</p> <p>Parks department has limited marketing budget. However, website has good trip planning information, also a downloadable ‘digital park guide’, maps and videos.</p> <p>Mungo National Park is very important for the tourism in the region and primary reason people go to the area – an anchor destination.</p>
<b>Social Media Presence</b>	Limited social media presence – Parks Canada has Facebook for all NWT sites but low followers; NWT and AB tourism social media is geared to key destinations/attractions in their provinces.	Western Australia Parks has a Facebook and Twitter presence but not the site individually; the number of followers is very low; regular postings but little engagement with users.	Facebook page for all New South Wales parks, nothing specific for Mungo National Park or Willandra Lakes Region.
<b>Use of WHS Brand &amp; Positioning</b>	No specific brand positioning	<p>Purnululu is positioned as a ‘last frontier’ outback wilderness/frontier site.</p> <p>WHS brand is used in all marketing materials although impact on visitation is not known.</p>	<p>Mungo National Park is the ‘visitor experience’ in the Willandra Lakes Region.</p> <p>The Mungo website features WHS designation and it is used in the limited marketing efforts.</p>

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