Tourism Destination Visitor Appeal Assessment

Eastern Region, Newfoundland and Labrador

FINAL REPORT
September, 2014

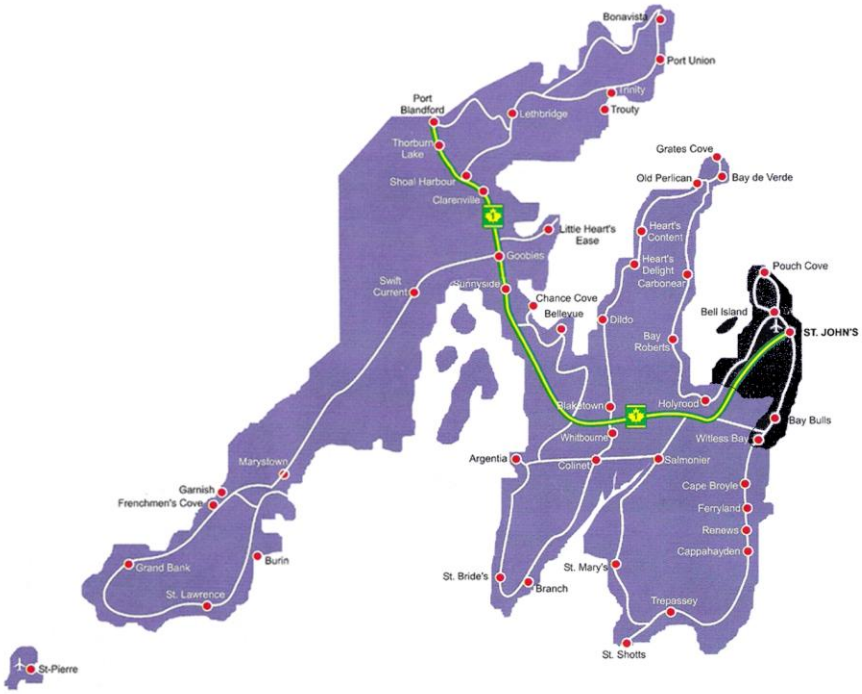
HOSPITALITY NEWFOUNDLAND & LABRADOR

Newfoundland Labrador

LEGENDARY COASTS EASTERN NEWFOUNDLAND

Atlantic Canada Opportunities Agency | Agence de promotion économique du Canada atlantique

Conducted by: BRAIN TRUST Marketing & Communications | THE TOURISM CAFE



Map of the Eastern Destination Visitor Region

The municipalities within the Eastern Region catchment area include:

Admirals Beach	Duntara	Rushoon	Small Point Adam's Cove-
Aquaforte	Elliston	Salmon Cove	Blackhead-Broad Cove
Arnold's Cove	English Harbour East	Long-Harbour-Mount	South River
Avondale	Fermeuse	Arlington Heights	Southern Harbour
Baine Harbour	Ferryland	Lord's Cove	Spaniard's Bay
Bauline	Fortune	Marystown	St. Bernard's-Jacques
Bay de Verde	Fox Cove-Mortier	Mount Carmel-Mitchells	Fontaine
Bay L'Argent	Fox Harbour	Brook-St. Catherine's	St. Bride's
Bay Roberts	Frenchman's Cove Garnish	Musgravetown	St. Jospeh's
Bishop's Cove	Gaskiers-Point La Hay	New Perlican	St. Lawrence
Bonavista	Grand Bank	Normans' Cove-Long Cove	St. Mary's
Branch	Grand Le Pierre	North River	St. Shott's
Brigus	Hant's Harbour	Old Perlican	St. Vincent's - St. Stephen
Bryant's Cove	Hant's Desire	Parker's Cove	Peter's River
Burin	Harbour Grace	Placentia	Sunnyside (Trinity Bay)
Cape Broyle	Harbour Main-Chapel's Cove-	*Point au Gaul*	Terrenceville
Carbonear	Lakeview	Point Lance	Trepassey
Chances Cove	Heart's Content	Point May	Trinity
Chapel Arm	Heart's Delight-Islington	Port Kirwan	Trinity Bay North-Port Union-
Clarenville	Holyrood	Port Rexton	Melrose-Catalina-Little
Clarke's Beach	Keels	Portugal Cove South	Catalina
Colinet	King's Cove	Portugal Cove-St. Philip's	Upper Island Cove
Colliers	Lamaline	Pouch Cove	Victoria
Come By Change	Lawn	Red Harbour	Whitbourne
Conception Harbour	Lewin's Cove	Renews-Cappahayden	Whiteway
Cupid	Little Bay East	Riverhead	Winterland
			Winterton
			Witless Bay

The Legendary Coasts Eastern DMO visitor region includes those incorporated towns and rural communities within local service districts situated on the Bonavista and Burin Peninsulas and the Northern and Southern Avalon regions outside of the City of St. John's catchment area.

Executive Summary

VISION STATEMENT

Newfoundland and Labrador be a leading tourism destination, offering an authentic and exotic experience, through the 'creativity brand pillars of people, culture and the natural environment'.

Uncommon Potential

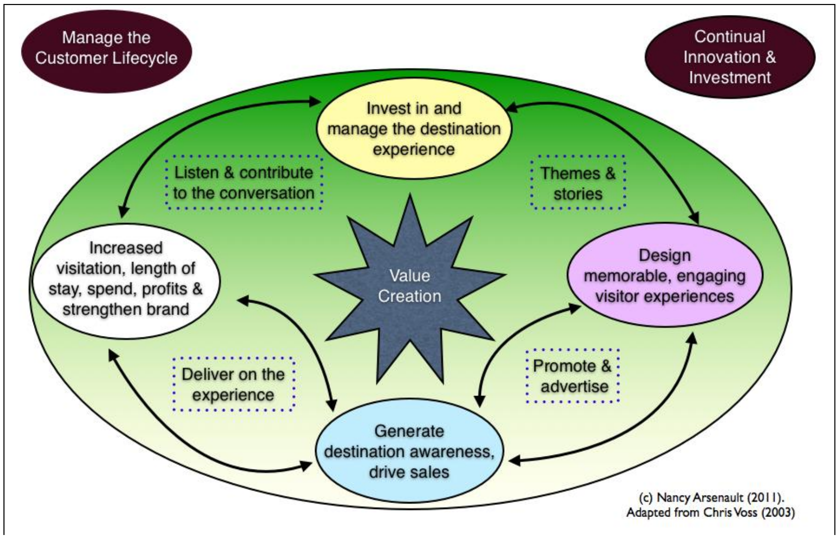
In 2009, the tourism industry and province of Newfoundland and Labrador (NL) released their tourism vision for the province that identified the goal of doubling annual tourism revenues to $1.58B by 2020. It was a blueprint for extra-ordinary growth that contained seven strategic directions, and a vision for the future.

One of the key strategic directions (#4) was product development - delivering strategic and sustainable travel experiences. As the products, services and experiences the visitors enjoy must deliver on the provincial brand promise and bring the brand to life, building on the unique natural attractions, cultural heritage and the colorful character of the people is essential in responding to travelers' desire to experience the destination.

To advance the focus and investment in achieving the goals for *Uncommon Potential: A Vision for Newfoundland and Labrador Tourism (Vision 2020)*, Hospitality Newfoundland and Labrador (HNL) in partnership with the Department of Tourism, Culture and Recreation (TCR), commissioned a formative evaluation of the Eastern Region to produce a destination development plan to guide tourism operators, the Eastern Destination Marketing Organization (EDMO), Hospitality Newfoundland and Labrador (HNL), Tourism, Culture and Recreation (TCR), Innovation, Businesses and Rural Development (IBRD), and the Atlantic Canada Opportunities Agency (ACOA) in their product, market and experience development efforts in the Eastern Region.

A customized Tourism Destination Visitor Appeal Appraisal (TDVAA) process was created by Brain Trust Marketing and Communication and the Tourism Café Canada Ltd based on a review of various destination development planning approaches across Canada.

The Tourism Experience Investment Cycle



Designed with a visitor-centric approach to the Tourism Experience Investment Cycle, over 120 documents, reports and studies combined with multiple community-based and online stakeholder input and feedback meetings, over a period of 10 months (April 2013 to Feb 2014), led to this report. A final minor set of revisions was then completed in July after the Labrador region was completed that added complementary learning.

Specifically, five dimensions were examined in this study:

1. Reports, plans and research documents, and projects-in-the-pipeline.
2. Visitor profile information and three important customer engagement tools for tourism services and attractions and municipalities: Websites, Facebook and TripAdvisor.

3. Product and market dimensions which included: primary and secondary demand generators, transportation and access, visitor information centers, accommodations, culture, heritage and nature based assets, trails and routes, recreational and man-made attractions, shopping and retail, culinary, food and beverage, conference, conventions and trade shows, activity-based tourism businesses (e.g. whale watching) and program based tourism businesses (e.g. festivals and events, guiding companies).
4. Sustainability dimensions: human resources, sales and marketing practices, environmental and social practices, strategic planning and investment.
5. Measures of success.

To strengthen the Eastern Regions ability to contribute to *Vision 2020*, the goals for this Destination Development Plan (DDP) were to create an understanding of what needs to be done to strengthen the ability to grow the tourism industry in ways that:

1) Resonate with travelers, reinforce the brand and increases the return on investment;
2) Continue to improve the visitor experience and visitor economy; and
3) Empower the Eastern Region to be a visible leader of responsible, sustainable tourism.

The Key Results and Findings

Tourism is the fastest growing industry and the single largest employer in the world. But bigger isn't always better. Sometimes "less is more" and “rural is just as appealing as urban” to the right guest. Newfoundland and Labrador has the opportunity, in the Eastern Region, to increase growth through increased investment in tourism product development and assisting services and attractions to invest in connecting with their customers and prospective guests in enhanced and meaningful ways.

Future success for the Eastern Region lies in a fully integrated approach to developing tourism that provides a collaborative platform to compete; knowing when to lead, support, or follow; sharing the investment and risk; and focusing the human, financial, and technical resources where they will generate the greatest benefits for travellers, businesses, communities, the province and to strengthen the collective perception of Newfoundland and Labrador’s brand.

A regional approach that recognizes and appreciates the value of each sub-region’s tourism assets is recommended. Visitors may not be aware of where the sub-regional boundaries even exist, therefore, it is incumbent on the industry to ensure their journey is relevant, fits their schedule, and invites them to places aligned with their travel motivations while offering the benefits they are seeking.

Twenty aggregate findings emerged from the Eastern Region. The key findings are supported by tactical actions that provide the foundation for operators, the EDMO, HNL, TCR, IBRD and ACOA to examine how each can lead or partner in achieving the recommended actions and ‘collaborate to compete’ for positive change.

- ***Finding #1:*** Extend the brand by connecting the traveller’s experience through all touch-points in the visitors’ lifecycle.
- ***Finding #2:*** Investment in product innovation and experience development is essential for the long-term tourism sustainability of the Eastern Region.
- ***Finding #3:*** NL’s long term tourism sustainability is vulnerable due to the increasing dependency on resident travel.
- ***Finding #4:*** Non-resident visitor profiles for the Eastern Region support a propensity to pay higher prices for experiential travel, yet many tourism operations charge low or no fees.
- ***Finding #5:*** Position the primary demand generators and experience categories with complementary visitor opportunities in the surrounding area.
- ***Finding #6:*** Tourism businesses and municipalities are not optimizing their online presence with even the most basic, widely accepted tools.

- ***Finding #7:*** The destination will benefit from a richer inventory of program-based providers that can actively engage guests, deliver authentic, personalized experiences and command a higher price or value proposition while increasing the return on emotion (ROE).
- ***Finding #8***: Activity based experiences should be encouraged to broaden their product offer to appeal to more diverse and ever evolving traveller types.
- ***Finding #9:*** There is an opportunity to improve the food and beverage options in the Eastern Region but the owners/operators face a number of challenges.
- ***Finding #10:*** Expand the number of authentic retail establishments that celebrate local artisans and crafts people and connect travellers to the hidden gems in the rural area.
- ***Finding #11:*** Accommodation capacity variances throughout the region, particularly during the high season, are impacting the potential for the visitor economy.
- ***Finding #12:*** The majority of cultural, heritage and natural tourism assets and not-for-profit operations are challenged with on-going sustainability.
- ***Finding #13:*** Enhance the visitor planning and journey to the Eastern Region by proactively communicating the limited transportation options available within the region and harmonizing the way-finding experience.
- ***Finding #14:*** Strengthen the results for high season before diversifying resources to expand into shoulder seasons.
- ***Finding #15:*** The role of all Visitor Information Centres and the contributions of staff should be reviewed to ensure their contributions to the visitor's experience and travel journey are optimized.
- ***Finding #16:*** The availability of qualified staff will continue to be a challenge; seeking shared solutions should be explored.
- ***Finding #17:*** There is a scarcity of information relating to the protection of the natural environment in developing and managing the Eastern Region as a tourism destination.
- ***Finding #18:*** There is a rich resource of research, studies and plans that should be explored for future projects before further investment is made.
- ***Finding #19:*** Enhancements to the TCR Tourism Destination Management System and Restaurant Association of NL's E-Dining database could be made with additional visitor appeal variables.
- ***Finding #20:*** Amend five *Vision 2020* goals to optimize the investment focus needed to achieve the desired outcomes.

Implementation

This Destination Development Plan outlines the process for implementation once the report has been accepted. Implementation requires participation and engagement from stakeholders and success will come only if efforts begin from the ground up. Facilitated leadership will be provided by HNL and TCR, with direct participation from the EDMO Board and TDVAA Advisory Committee.

Implementation will look different depending on the specific recommendation and as different individuals in different organizations become the champions for action. This report includes the recommendations, with assigned responsibilities that respond to a specific finding. Typically, responsibility for implementation will be assigned to Operators, the EDMO, HNL or TCR, ACOA, IBRD or a collection of several of these entities. In some cases recommendations will be assigned to an Implementation Task Team. Implementation Task Teams will be discussed in a later section of this document.

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1. An Investment in the Future

In 2009, the tourism industry and province of Newfoundland and Labrador (NL) released their tourism vision for the province that identified the goal of doubling annual tourism revenues to $1.58B by 2020. It was a blueprint for extra-ordinary growth that contained seven strategic directions, and a vision for the future.[1]

> VISION STATEMENT
>
> Newfoundland and Labrador be a leading tourism destination, offering an authentic and exotic experience, through the 'creativity brand pillars of people, culture and the natural environment'.
>
> *Uncommon Potential*

Guiding this vision is respect for home, residents, travellers, communities and profitability. As a key economic driver of growth, building regional pride, and creating employment, Newfoundland and Labrador's tourism success lies in creating "an industry environment that supports the development of authentic and unique experiences, attracting travelers - residents and non-residents alike - as well as providing local economic development and employment opportunities."[2]

Positioned by a brand that stands for 'creativity', the visitor economy will be stimulated by promotions and advertising that is natural, spontaneous, and uncomplicated. An emotional brand position that stands on the three pillars of the real character of the people, a rich history, heritage and culture, and the natural environment that enjoys 29,000 km of coastline and icons.[3]

Contributing to *Vision 2020*

One of the key strategic directions in the Vision (#4) is product development - delivering strategic and sustainable travel experiences. The visitor experience is a combination of the pre-visit engagement, a mix of places they visit, activities and services they enjoy, and the people with whom they connect. This creates the memories that they may choose to share through photos, online messages, or private reflection. It is the sum of their emotional and physical connection to the Eastern Region that must be addressed in a regional Product and Experience Development Plan.

Building on the unique natural attractions, cultural heritage and the colorful character of the people, the tourism invitation and offer must respond to travelers' desire to experience the destination. Accordingly, the goals of this plan are to articulate a Destination Development Plan (DDP) that must:

1. Resonate with travellers and reinforces the brand and increase the return on investment;
2. Continue to improve the visitor experience and visitor economy; and
3. Be a visible leader of responsible, sustainable tourism.

[1] Newfoundland and Labrador (2009). *Uncommon Potential: A Vision for Newfoundland and Labrador Tourism.*
[2] *Tourism Vision Evaluation, 2012 Report*
[3] NL Brand Positioning Statement. www.tcr.gov.nl.ca/tcr/tourism/tourism_marketing/newfoundland_and_labrador_brand.

The DDP must also address three concerns identified in *Vision 2020*:

1. Ensuring a critical mass of authentic experiences and attractions, with supporting infrastructure responds to demand and expectations;
2. Developing multi-season tourism demand in ways that drive demand and are financially sustainable; and
3. Balancing people's desire to travel with protection of the natural environment.

Purpose of the Project

The Tourism Destination Visitor Appeal Assessment (TDVAA) responds to the Newfoundland and Labrador Tourism Board's (NL Tourism Board) interest in advancing Objective 4 of *Vision 2020*[4] which is focused on product and experience development.

In partnership with Hospitality Newfoundland and Labrador, the Department of Tourism, Culture and Recreation (TCR), and the Eastern Destination Management Organization, a formative review process was embraced to assess the appeal of the Eastern Region, identify gaps and opportunities, and ensure alignment for investment and development of the destination with the province over both the near and long term.

Brain Trust Marketing and Communications and the Tourism Cafe Canada partnered as the external contract team to lead a customized approach of the assessment, one that will be replicated in the other four regions of Newfoundland and Labrador (NL).

Acknowledgements

The Eastern Region stakeholders were the pioneers who participated throughout the 10-month process to provide and document information, insights and validation of the findings; which was essential in ensuring the business, municipal, sub-region and regional perspectives and issues were captured and considered.

Critical to the process was a cadre of data collectors, TCR's research and product development staff, the EDMO, the Restaurant Association of Newfoundland (RANL), and colleagues from many organizations including Innovation, Business and Rural Development (IBRD), the Atlantic Canada Opportunities Agency (ACOA) and Hospitality Newfoundland and Labrador (HNL).

Oversight for the project came from the Eastern Region Tourism Advisory Committee. They provided grounded truth telling at the local level, all in support of the project team that was comprised of individuals from the NL Tourism Board, HNL, TCR, the EDMO, Brain Trust and the Tourism Cafe.

A full list of individuals that contributed to this project is listed in Appendix 1.

4 Government of Newfoundland Labrador. (2009, February). Uncommon Potential: A Vision for Newfoundland and Labrador Tourism. Retrieved from http://www.tcr.gov.nl.ca/tcr/publications/2009/Vision_2020.pdf

2. The Destination Assessment Framework

2.1 What is a Tourism Destination Visitor Appeal Assessment?

The Tourism Destination Visitor Appeal Appraisal (TDVAA) is designed to provide a foundation of knowledge about Newfoundland and Labrador's *"appeal"* at a regional level that incorporates new insights from the customer's perspective. Understanding the appeal of a region's assets and attributes is vital to identifying priorities for investing in product development that best delivers on the provincial brand promise. This appraisal is designed to gather a wide range of insights that will form the basis for analysis, findings, and ultimately a set of recommendations. The recommendations will inform industry associations, tourism services and attractions, stakeholders, and the government about the strengths in providing memorable travel experiences and identify where investment is needed to enhance the competitiveness of the destination and individual tourism businesses.

This formative evaluation process is designed to identify a series of recommendations and action steps that will enable industry, in collaboration with the EDMO, HNL, TCR, IBRD and ACOA to create innovative, authentic and new tourism experiences and enhance existing tourism attractors and infrastructure. This in turn leads to growth in visitation and revenues to both tourism businesses and the province.

Sophisticated travelers expect vacation experiences that tell the true story of the destination. Experiences that let you emotionally connect to a place and at the same time, self-discovery.

Uncommon Potential

Benefits of Investing in this Appraisal

The core benefit of investing in a TDVAA is to gain a consolidated understanding of the destinations' potential to strengthen the visitor economy by ensuring the assets and attributes of a region are aligned in ways that optimize the tourism investment cycle (Figure 1).

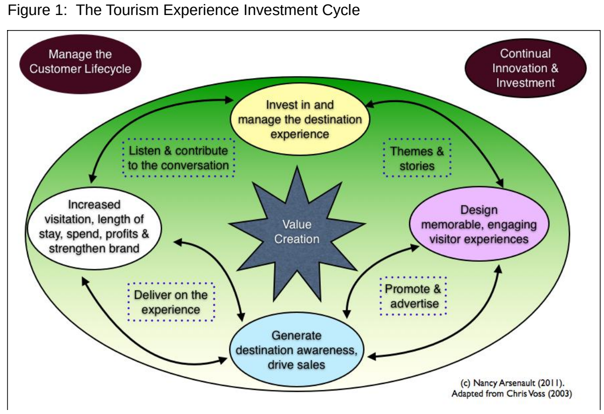
The visitor economy has a broader focus than that of the 'tourist' as it encompasses all value created by attracting visitors to a destination; all the things that make the place special, distinctive, engender pride and create memories.

The infrastructure reinforces the sense of place. The way finding, transportation, trails, and public spaces create the stages for interaction. Services cater to the needs of visitors (and of residents), and combine to create social and economic benefits to travellers and the host community alike.

"A successful visitor economy requires managing all of the components in an integrated and long-term way, with a clear focus on the needs of the visitors the destination is seeking to attract. That focus must reflect the destination brand and presents these to the market in a way that influences perceptions and expectations, and persuades people that they are worth trying."[5]

Creating value requires having a clear understanding of your ideal guests (based on psychographic and geographic information).

Figure 1: The Tourism Experience Investment Cycle



[5] Culture Northwest (2006). *Understanding the visitor economy.* Downloaded from: http://culturehive.co.uk/wp-content/uploads/2013/04/Understanding-the-Visitor-Economy.pdf

It also includes an understanding how this informs decisions about designing and delivering memorable visitor experiences, generating awareness to drive the sale, reaping the benefits of increased economic output and community pride and contributing to strengthening the brand of Newfoundland and Labrador.

Specifically, the benefits from this study include:

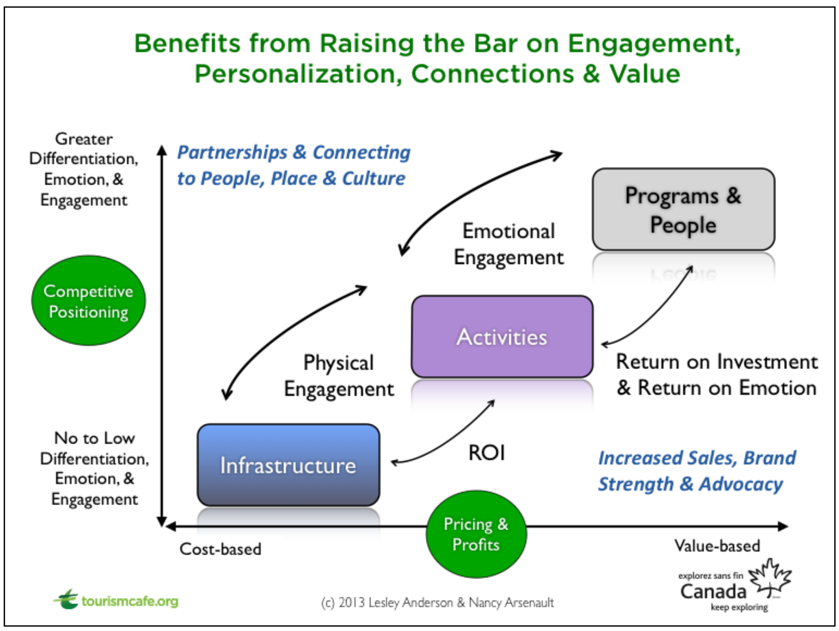
- A synthesized database of critical tourism business data within the destination;
- An understanding of the destinations current state and status within the larger tourism marketplace and the opportunities and challenges associated with that state;
- An informed foundation for preparing a long-term regional destination product development plan that will also inform the marketing strategy;
- An ability to prioritize investments in infrastructure, activity and program development to enhance the visitor experience that in turn will lead to new revenues, increased visitation and the ability to deliver on the brand promise; and
- An engaged industry in the discussions, outcomes and implementation requirements for the study.

2.2 Raising the Bar

The ability to increase the benefits from the Visitor Economy for travellers and businesses alike can be enhanced by understanding and raising the bar on the value of the travel experience (Figure 2).

The ability to enhance competitive positioning, price points and profits can be achieved through increasing the level of engagement, personalization, connections to people and place, and knowing what different traveller types value.

Figure 2: Raising the Bar on Value to the Visitor



In tourism there are three types of services/attractions that fundamentally contribute to the visitor experience mix, but have very different operating realities.

1. Infrastructure based businesses/operations have high fixed costs, require volume and/or base funding to build, maintain or preserve the facilities, hence they focus on the mass market with targeted niche markets to drive business. Examples include hotels, historic sites, parks, attractions, theatres, restaurants, transportation, sports facilities and large tour operators who own their transportation.

2. Activity-based businesses/operations have fixed costs related to a particular type of activity, but compared to infrastructure based businesses the capital investment is much lower. They require steady volume and often cater to niche markets and smaller groups as often some skills or equipment associated with the activity is required. Examples include whale watching or kayaking companies and outfitters.

3. Program and people based businesses/operations have no infrastructure costs; rather they rent or pay user fees to gain access to places to stage their visitor interactions. They typically appeal to very niche markets, have a low-volume, high-yield ratio, and know their customers extremely well to earn a living with low volume. Examples: Guiding companies, storytellers, artisans, and musicians. The one exception is festivals - that do appeal to larger markets at a lower price point, but they are fully dependent on the quality of people and programs that are foundational to the 'reason to visit' and therefore are in this category.

Travellers will explore the options all three types of companies offer. Depending on the purpose of their visit, length of stay and who they are travelling with, they may only need to connect with one type of company. But more often than not, there is the opportunity to enhance the invitation by clustering businesses around an ***'experience category'*** that appeals to one or more traveller types and by ensuring they know the businesses that can contribute to their journey. It is more than packaging (hotel + restaurant + transportation + discount) that benefits only those packaging partners. A focus on experience categories, such as the Eastern Region's fishing heritage, allows the planning and developing of travel experiences that connect communities, businesses, sub-regions - often through a story, theme, or history. This feeds directly into the visitors desire to go deeper being drawn to touch points that connect them to the place they are visiting.

2.3 Methodology

The TDVAA uses a formative evaluation research methodology, a mix of qualitative and quantitative data, and employs an iterative process for stakeholder input at multiple touch-points throughout the data gathering, analysis and recommendation development phase of the project. For the Eastern Region TDVAA these touch-points included:

- Numerous meetings and stakeholder sessions to set the parameters of the research framework;
- Collecting qualitative and quantitative data with client and stakeholder input;
- Consolidating and analyzing the data to produce preliminary findings to be shared with clients and stakeholders; allowing for input;
- Formulating the findings, opportunities and recommendations, again securing client and key stakeholder input;
- Finalizing the report, where stakeholders have their final opportunity for input; and
- Submitting the final report.

Separate documents that detail the: (1) Research Process (2) Research Framework (3) Data Collection process and template are available from HNL, TCR and the EDMO.

Data Sources

The data collected was designed to inform five key dimensions: (1) reports, plans and studies, (2) the visitor, (3) product and market, (4) sustainability, and (5) measures of success (Table 1). A glossary of terms for the project is included in Appendix 2.

Table 1: Key Dimensions

1. Reports, Plans and Studies Dimensions. Existing information available to industry, plus projects in the pipeline at the discussion stage or submitted for approval/funding.		
Consolidate Existing Information	Existing information Projects in the pipeline	Identifies the documents, plans, studies, and projects that impact tourism (secondary data).
2. Visitor Dimensions. A tourism destination with a high appraisal can demonstrate their investment in understanding the traveller.		
The Visitor Profile	Demographic research Psychographic research Satisfaction & exist surveys	Identifies the research available to inform decision-making based on an understanding of the traveller.
Customer Engagement	Website and social media links Trip Advisor Facebook	Assesses if the destination, cities and businesses have a TripAdvisor & Facebook account and the degree of responsiveness to traveller posts.
3. Product and Market Dimensions. Determines the depth and breadth of tourism products, services, and experiences available at various price points for different markets.		
Assets & Attributes	Baseline Infrastructure Activity-Based Tourism Businesses Program-Based Tourism Businesses Demand Generators/Visitation Motivators	Identifies the core tourism assets and demand generators that contribute to a positive visitor experience and motivate travellers to visit.
4. ***Sustainability: Growing Tourism into the Future Dimensions.*** Key elements of a responsible, sustainable tourism destination.		
Resource Base	Human Resources Sales & Marketing Environmental & Social Practices Strategic Planning & Investment	Essential resource investments to sustain a viable tourism business and destination into the future.
5. ***Measures of Success Dimension.***		
Key Performance Indicators	Measures of Success	Specific, measurable indicators of success against which to benchmark.

A total of 119 documents were reviewed at the international, national, provincial, regional and community level to inform all five dimensions. Additionally, client meetings and community-based stakeholder meetings provided facts and context to the foundation of knowledge used to produce the key findings and recommendations. Appendix 3 provides a bibliography of all secondary sources considered. Primary research was conducted to secure and organize the information needed for dimensions 2, 3, and 4.

2.4 Project Scope and Limitations

The TDVAA was focused at the Eastern Region level. This was not a comparative analysis of the sub-regions or individual businesses. Recommendations, actions and opportunities focus at the regional level. Implementation of the recommendations will vary depending on the tourism operator or agency leading (e.g. EDMO, TCR, IBRD & ACOA).

The key limitations to this TDVAA, beyond the Eastern Region being a pilot region for a customized destination development planning process, included the:

- Ability of the primary data collectors to gather information from tourism businesses during high season;
- Degree to which the advisory committees, industry, and government stakeholders engaged in the process to inform and contribute to the process;
- Level of detail the reports and documents could be reviewed given the unanticipated volume;
- Interpretation of what constitutes a 'project in the pipeline' relative to it being a community asset vs. an asset that drives visitation;
- Amount and type of data available at the regional level relative to the provincial level;
- Changes to Statistics Canada's Travel Survey of Residents of Canada in 2011 resulted in an inability to compare data for the Resident's survey to previous years.
- Variables available from the provincial Tourism Destination Management System (TDMS) and the E-Dining Data Base of RANL; and
- Budget and human resources available.

The key players are identified in each recommendation (Chapter 3), and a summary table for the phasing of core implementation activities is presented in Chapter 5.

3. Key Findings & Recommendations

Tourism is the fastest growing industry and the single largest employer in the world. But bigger isn't always better. Sometimes "less is more" and “rural is just as appealing as urban” to the right guest. Newfoundland and Labrador has the opportunity, in the Eastern Region, to increase growth through increased investment in tourism product development and assisting businesses to invest in connecting with their customers and prospective guests in enhanced and meaningful ways.

Future success for the Eastern Region lies in a fully integrated approach to developing tourism that provides a collaborative platform to compete; knowing when to lead, support, or follow; sharing the investment and risk; and focusing the human, financial, and technical resources where they will generate the greatest benefits for travellers, businesses, communities, the province and to strengthen the collective perception of Newfoundland and Labrador’s brand.

A regional approach that recognizes and appreciates the value of each sub-region’s tourism assets is recommended. Visitors may not be aware of where the sub-regional boundaries even exist, therefore, it is incumbent on the industry to ensure their journey is relevant, fits their schedule, invites them to places aligned with their travel motivations and offers the benefits they are seeking.

The goals of the experience strategy must:

(1) Resonate with travellers, reinforce the brand and increase the return on investment;

(2) Continue to improve the visitor experience and visitor economy; and

(3) Be a visible leader of responsible, sustainable tourism.

As a result of the April 2013 to February 2014 formative assessment of the Eastern Regions’ Tourism Destination Visitor Appeal, 20 core findings emerged that support the full spectrum of goals identified in *Vision 2020* for the Destination Development Plan (Appendix 5). An Eastern Region approach is the focus of this Destination Development Plan. Through implementation, the spectrum of recommendations should benefit stakeholders in all the sub-regions and business types.

Summary of the Key Findings

There were 20 aggregate key findings emerging from the Eastern Region TDVAA based on a multitude of information sources including documents, reports, studies, multiple community stakeholder meetings and online presentations, on-going input from the advisory committee, and the HNL and TCR project representatives.

Associated with each high level finding detailed in Chapter 3 are tactical actions that will provide the foundation for operators, private and public sector champions, the EDMO, HNL, TCR, IBRD and ACOA to examine how each can lead or partner in achieving the recommended actions and ‘collaborate to compete’ for positive change.

The detailed data that helped to inform these findings is presented in Chapter 4.

FINDING #1**:** Extend the brand by connecting the traveller’s experience through all touch-points in the visitors’ lifecycle.

FINDING #2: Investment in product innovation and experience development is essential for the long-term tourism sustainability of the Eastern Region.

FINDING #3: NL’s long term tourism sustainability is vulnerable due to the increasing dependency on resident travel.

FINDING #4: Non-resident visitor profiles for the Eastern Regions support a propensity to pay higher prices for experiential travel, yet many tourism operations charge low or no fees.

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FINDING #15: The role of all Visitor Information Centres and the contributions of staff should be reviewed to ensure their contributions to the visitor's experience and travel journey are optimized.

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FINDING #17: There is a scarcity of information relating to the protection of the natural environment in developing and managing the Eastern Region as a tourism destination.

FINDING #18: There is a rich resource of research, studies and plans that should be explored for future projects before further investment is made.

FINDING #19: Enhancements to the TCR Tourism Destination Management System and Restaurant Association of NL's E-Dining database could be made with additional visitor appeal variables.

FINDING #20: Amend five *Vision 2020* goals to optimize the investment focus needed to achieve the desired outcomes.

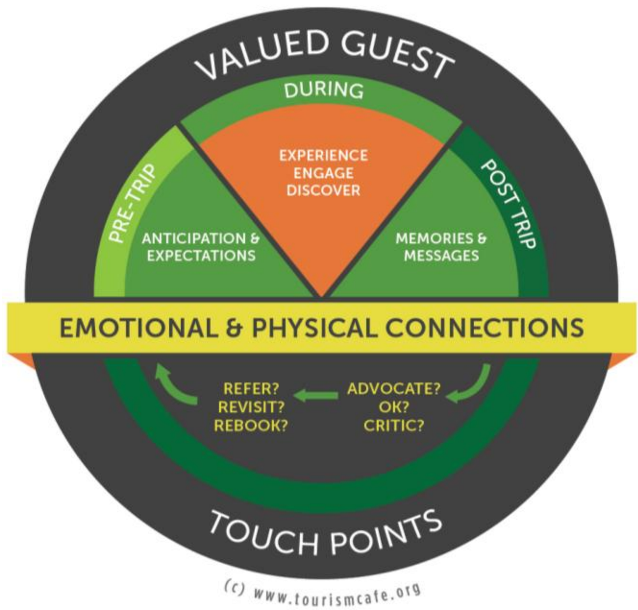
Finding #1: Extend the brand by connecting the traveller's experience through all touch-points in the visitors' lifecycle.

Newfoundland and Labrador has a powerful, award-winning brand that has raised the bar in destination marketing. Garnering domestic and international respect alike, the shift from selling products to telling unique, authentic stories of the destination has been impactful.

The primary responsibility to deliver on the brand promise however, resides with the tourism services and attractions.[6] Currently information on the NL brand is available online (www.gov.nl.ca/brand/) but there is an opportunity to assist industry in understanding how to align their product and marketing activities with the brand and ultimately contribute to delivering on the brand promise through all touch-points of the visitor lifecycle.

Opportunity/Recommendations

1. **TCR:** Invest in creating a NL Brand Development Guide that describes the brand promise and brand position, and provides information to industry on a range of topics from 'who we are', to what NL is selling, customer profiles, experience categories that bring the brand to life, to promotions, media and advertising. As Travel Alberta (Oct 2013)[7] and Travel Manitoba (Jan 2014)[8] recently have done, these development guides not only align with the CTC but they help operators understand how to align their unique selling proposition and unforgettable experiences with the brand, so together they can align with the province in tapping the emotions of travellers and creating a personal connection before, during and after their NL journey.



2. **EDMO:** Identify core experience categories that can weave a unique story and take a traveller through a number of thematically linked visitor experience categories with each leveraging the current demand generators by adding new components to the story.

3. **EDMO & Operators**: Examine current product offer and planned visitor experience development against the Newfoundland and Labrador brand promise and brand pillars while strategically portraying the unique offer within the context of the Eastern Region's "Legendary Coasts" positioning.

These recommendations support Goals 1.2, 1.3, 6.1 and 6.3 of *Vision 2020*.

[6] A tourism business is defined as any private, public or not-for-profit entity where attracting and serving visitors is the reason the business exists, or a major component of the operation.

[7] https://industry.travelalberta.com/Marketing%20Toolbox/~/media/Industry/Attachments/Marketing%20Toolbox/Experience%20Workbook-2012-final_lr-spreads.pdf

[8] http://www.travelmanitoba.com/includes/content/docs/media/19384_Travel-Manitoba-Partner-Toolkit_FINAL.pdf

Finding #2: Investment in product innovation and experience development is essential for the long-term tourism sustainability of the Eastern Region.

The Eastern Region has a strong base of tourism assets that create an ideal foundation on which to build theme-based experience categories. The importance of investing in product and experience development cannot be overstated. While investing in, and enhancing the product offer is the responsibility of individual businesses, the responsibility to assist operators in working collaboratively to weave experiences together, create regional benefits and drive experience development, would be best served at the EDMO level. It would allow for integration between sub-regions, create the ability to focus on the visitors' journey to multiple communities and increase the ability to connect a variety of businesses.

The variety of tourism assets in the Eastern Region lends itself to thematic development of visitor experience categories[9] that create a holistic invitation to visitors to explore the region. This will however, require a shift from the current project-based and sub-regional approach to a more inclusive Eastern Region approach. Given the current diversity of infrastructure[10] and activity based[11] visitor experiences, combined with the potential to layer on program based opportunities[12], experience categories can provide the focus to collaborate, design and deliver on the brand promise and align with the story-based approach that has been so successful when marketing NL. Where current strength and investment exists (e.g. Bonavista Peninsula), this provides a point of departure to continue building on, however, it must be done relative to building a story and creating a journey, rather than a specific sub-regional focus.

Opportunity/Recommendations

1. **EDMO, Operators & TCR:** Experience categories, designed to connect travellers to the stories of the Eastern Region, align communities, profile iconic demand generators and encourage travel in the region can deliver on the provincial brand promise by creating the platform for collaboration, designed to appeal to certain traveller types, and raise the bar on visitor value. Two emerged as most promising in the immediate short-term and the experience gained in developing them will be of value to future theme development such as an artisans trail, ecological exploration, and trail related activities:
    - **Geological Treasures:** Newfoundland and Labrador is rich in geological wonders and the Eastern Region has its own share of these assets. Mistaken Point at Portugal Cove South, Fortune Head Ecological site in Fortune, the Manuals River Experience plus numerous sites on the Bonavista Peninsula have international recognition and significance. They set the stage for any number of engaging visitor experiences and could become the 'on the ground' extension that lures guests into the Eastern communities, in particular, for guests who begin their Newfoundland geological experience at the Johnson Geo Centre in St. John's. Either through self-discovery, by engaging a local interpretive guide, or visiting an interpretation centre, guests have an opportunity to see first-hand some of the oldest rocks in the world and unique geological landscapes. The Discovery Aspiring GeoPark concept proposed for development on the Bonavista Peninsula initially includes developing three geological sites with interpretation and educational programming, albeit numerous additional sites have been identified.

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[9] A visitor experience category is a thematically linked story or theme that appeals to one or more visitor types and creates the opportunity to create a journey through multiple communities, while engaging in a range of connected visitor activities from self-discovery through to interactions with the locals. Experience categories should deliver on the brand promise, generate demand and provide opportunities for multiple businesses and communities to connect with travellers.

[10] *Infrastructure based businesses* have high fixed costs, require volume and/or base funding to build, maintain or preserve the facilities hence they focus on the mass market with targeted niche markets to drive business. Examples include hotels, historic sites, parks, attractions, theatres, restaurants, transportation, sports facilities and large tour operators who own their transportation

[11] *Activity-based businesses* have fixed costs related to a particular type of activity, but compared to infrastructure based businesses the capital investment is much lower. They require steady volume and but often cater to niche markets and smaller groups as often some skills or equipment associated with the activity. Examples include whale watching or kayaking companies and outfitters.

[12] *Program and people based businesses* have no infrastructure costs, rather they rent or pay user fees to gain access to places to stage their visitor interactions. They typically appeal to a very niche markets, have a low-volume, high-yield ratio, and know their customers extremely well to earn a living with low volume. Examples: Guiding companies, storytellers, artisans, and musicians. The one exception is festivals - that do appeal to larger markets at a lower price point, but they are full dependent on the quality of people and programs that are foundational to the 'reason to visit' and therefore are in this category.

- **Fishing Heritage:** The heritage associated with fishing can be traced back to the 16th century when fishermen from France, Spain, Portugal, Ireland, and eventually England arrived to feed on the fish of Newfoundland and Labrador. The Eastern Region once rivaled St. John's as one of the fishing capitals of North America. Visitors have an opportunity to discover dozens of fishing centric attractions and experiences like the Fisherman's Museum in St. Vincent's, Ryan Premises National Historic site in Bonavista, the Port Union National Historic District, Cupids, Canada's oldest English settlement and Colony of Avalon – Ferryland. The fishing heritage concept builds on the 500 Years of Fishing Heritage proposal that originated on the Bonavista Peninsula. The joint initiative of cultural and heritage organizations to have a themed self-guided touring experience should build on the efforts of those on the Discovery Trail and be expanded to include the entire Eastern Region.

2. **TCR & EDMO:** Set baseline measures for capturing the metrics associated with the experience categories (e.g. number of communities involved, number of businesses impacted, number and type of options available to visitors, range of price points from free to high value, etc.).
3. **TCR, IBRD, HNL & ACOA:** Advocate for, and support increasing resources to the EDMO for two to three 3-year experience development positions to allow them to hire a full-time product/experience development expert (not a consultant) who can be in the field and on the ground, working with operators on an ongoing basis to facilitate the development of new or enhanced experiences and lead the process for development of thematic experience categories.
4. **TCR, IBRD, ACOA & EDMO**: If funding is secured, hire a highly skilled tourism professional to support experience development, packaging and community tourism development throughout the region by meeting with operators on a consistent basis.
5. **Operators:** Collaborate to compete by 'coming to the table' in support of regional development initiatives where there is a benefit to growing or enhancing your current offer. It is recognized that operators will come to the table with varying degrees of experience. Some will already have been working on enhancing the visitor experience and/or diversifying their revenue streams, others will be new to the discussion. Therefore, some communities may move along the development continuum quicker than others. The point however, is that cohesive development will be happening on the ground under a regional development theme and approach.
6. **TCR, EDMO & Operators:** Increase the number of packages and itineraries linked to an experience category, as well as, special events that include multi-night stay options by helping operator's stage multi-day itineraries in a number of communities where accommodations exist. Follow the lead of others within the region like the Coaker Foundation who has been developing market specific itineraries for many years.

These recommendations support Goals 3.2, 4.1, 6.2 and 7.1 of *Vision 2020*.

Finding #3: NL's long-term tourism sustainability is vulnerable due to the increasing dependency on resident travel.

While the resident travel market is of vital importance to the overall tourism economy, it has some limitations, as it does not generate the same return per visitor as non-resident travel. Currently, NL industry is dependent on 90% resident travel (up from 86% in 2011), which is above the national average of 81%. Add to this, the fact that 23% of NL's residents did not take a vacation in the past two years and of those that did, only 20% travelled exclusively in NL. The remaining 44% travelled in and out of province and 13% travelled only out of province.

Currently, there is detailed demographic and activity based information[13] at the regional level on non-resident travellers but little comparative information on resident travellers. The province is currently investing in a travel and motivations study for non-resident travellers, with findings to be released early in 2014; this needs to be replicated for resident travellers so operators have as much information as possible

[13] Demographic information in the 2011 non-resident exit survey includes: # non-resident travellers, mode of travel to the province, place of origin, trip purpose, party size and composition, length of stay, in-province expenditures, accommodation nights, participating in activities, age, education, average annual household income, and participation levels in activities.

on the resident traveller. Given resident travel is so significant, relative to volume, this information could help the Eastern Region understand their regional differences and traveller types, so they can target more effectively both non-resident travellers, but also tailor their product offer for resident travellers. For as the resident study concluded ***"Many of the barriers to travel in-province appear uncontrollable, e.g. more time, more money, but can potentially be influenced by offering the right product or experience as the desire to travel is genuinely there."***[14]

Opportunity/Recommendations

1. **TCR:** Replicate the 2014 non-resident survey for resident travellers, amending the variables to survey NL and gain insight into their travel relative to the sub-regions. The goal would be to provide equivalent resident visitor information to the EDMO at the regional level to understand the psychographic and demographic profile of residents' travelling within the province so operators can better design and deliver their visitor experiences and focus their investment in marketing.
2. **TCR:** Examine purchasing a provincial license for the CTC EQ research that would provide immediate access to award winning national psychographic segmentation research on Canada, the USA and 9 core international markets. Gain access to visitor profile data that provides information on core travel motivation, social values, travel behaviors, marketing considerations (product, price, place and promotion), experience appeal, dashboard demographics, and valuation information. If pursued, the budget should allow for additional investments in geo-targeting at the regional level, plus educational support to help operators understand and use the research.
3. **TCR:** Produce regional annual comparisons for resident and non-resident visitor numbers and per person expenditures based on the current definitions of the five tourism regions. At the present time, for the Eastern Region, to formulate a succinct picture they need to review the 2011 Exit surveys for Economic Zones 15 & 16 in one report, and Economic Zones 17-20, excluding St. Johns in a second report. This would provide a quick lens of the number and economic value of the two traveller types provincially and within each region. It would also allow them to benchmark their contribution to the *Vision 2020* goal of raising revenues to $1.58B that requires an annual growth rate of 5.2%,[15] which will be realized sooner if the non-resident travel to resident travel ratio is increased.
4. **EDMO**: Access the free CTC EQ research[16] and begin to identify the core traveller types that are best aligned with the regions product offer as a point of departure in encouraging product and market development targeted to increasing the number and return from non-resident travelers.
5. **TCR:** Set provincial benchmark for 2020 in shifting the % of resident travel (e.g. 85% resident 15% non-resident) and the Eastern Regions' relative contribution as a performance goal.
6. **HNL:** Continue to work at, and lobby to remove or minimize the barriers, in particular air and water access, that many non-residents experience when trying to efficiently and affordably travel to NL.

These recommendations support Goals 3.1, 4.1 and 6.2 of *Vision 2020*.

Finding #4: Non-resident visitor profiles for the Eastern Region support a propensity to pay higher prices for experiential travel yet many tourism operations charge low or no fees.

The Eastern Region has a wealth of not-for-profit, for profit and government visitor attractions and demand generators that are available at low or no cost to visitors. This is evidenced at the vast majority of culture, heritage and nature based tourism assets where emphasis is placed on self-discovery and not market-ready regularly scheduled activities and programmed based experiences that command an admission fee or program fee.

[14] Government of Newfoundland & Labrador. (2012, January). *Resident travel survey summary report - 2010.* A study conducted by MarketQuest Omnifacts Research. pg. 54

[15] Government of Newfoundland and Labrador (2012). Tourism Vision Evaluation, Annual Report 2012. P. 8.

[16] CTC Free EQ Profile Research: (https://en-corporate.canada.travel/sites/default/files/pdf/Resources/ctc_eq_profiles_2012-eng-lowres.pdf)

Given the age, education and income of the non-resident traveller vs. resident travellers (Table 3), attractions have an opportunity to consider adding, or increasing prices. NL is an expensive province to access, once visitors arrive, the likelihood of them being willing to pay for quality visitor experiences is high given the investment they have already made to travel to the island.

Table 2 Demographics

	Provincial **Resident** Travellers	Eastern Region Non-Resident	Avalon Region Non-Resident	St. John's Overnight Visits Non-Resident
Age (55+)	32%	58% of travellers	53% of travellers	47% of travellers
Education (University & post-graduate)	56%	77% of travellers	79% of travellers	82% of travellers
Average Annual Household Income $100,000 +	25%	57% of travellers	47% of travellers	53% of travellers

Source: 2011 Exit Survey profile of non-residents visiting Eastern Region (Economic Zones 15 & 16) and the 2011 Exit Survey profile of non-residents visiting Eastern Region (Economic Zones 17-20 minus St. Johns).

Opportunity/Recommendations

1. **Operators & IBRD:** Conduct an individual price comparison audit, perhaps during the Business Retention and Expansion (BR&E) process, among similar attractions and experiences against those located in other parts of the country, and then determine where you fit on the price / value scale. Where there is room for an enhanced pricing strategy, implement that over a 12-month period.
2. **Operators:** For those attractions whose tourism offer is provided for free or for a donation, revisit this strategy by conducting a comparative review of other similar Canadian attractions; this is particularly important for nature based tourism operators (ecological reserves, trails, waterfronts) who are undervaluing the experiences they deliver.
3. **Operators:** Identify and implement enhancements to your individual offers that add a higher level of customer engagement and experience (= value) and create a pricing structure that reflects the value delivered for enhanced experiences compared to your basic offering.
4. **Operators**: Create a higher yield per person by increasing the price point of existing tourism products, where the market can bear it. Where there is concern about the local area markets' willingness to pay, provide specials for the local market (e.g. Two for One Tuesdays).
5. **Operators:** Increase the number of visitor experiences (Infrastructure, activities and people/program) that delivers value to niche markets and commands a higher fee.

These recommendations support Goals 3.1, 4.1, 6.1 and 6.2 of *Vision 2020*.

Finding #5: Position the primary demand generators and experience categories with complementary visitor opportunities in the surrounding area.

There are a significant number of primary tourism demand generators located throughout the region that serve as anchor attractors. Steps need to be taken to better leverage these to drive extended stays and repeat visitation by ensuring visitors know about the other 'things to do' in the area, how long it takes to enjoy them, travel times and distances to get there, and other things that will help create the invitation to stay - rather than a single visitor activity.

Opportunity/Recommendations

1. **EDMO, HNL, Province & Operators:** Facilitate a series of training sessions that help operators understand the opportunities associated with planning itineraries, based on the interests of different traveller types, to create a stronger invitation for visitors' to remain in the region. In essence help the visitor connect-the-dots for opportunities that are aligned with common interests.

This recommendation supports Goal 4.1 and 7.2 of *Vision 2020*.

Finding #6: Tourism businesses and municipalities are not optimizing their online presence with even the most basic, widely accepted tools.

Websites: Tourism Businesses and Municipalities

There is a lost opportunity for tourism businesses and municipalities who do not have a mobile friendly and responsive website presence. If the traveller can't find the business or community; they won't know it exists, and won't be in their consideration set, it's as simple as that. The majority of travel planning occurs online prior to visiting and the use of the Internet to inform and influence the trip is important.

The Eastern Region has a strong base of infrastructure and activity based assets, yet only 54% have a web presence, 15% have a clear call to action, 39% provide information on 'how to get here', 41% accept phone or email reservations but only 4% accept online reservations, 31% accept credit cards, 15% have visitor testimonials, 24% include photos of visitors engaged, 48% have infrastructure imagery, 9% a travel trade page, 2% a blog, and 3% a link to their TripAdvisor page.

For visitors who may search the name of a town first to find what is available in the community and region, 41% in the Eastern Region could be found through a municipal website and of those 32% had a basic tourism section. The imagery emphasized the physical infrastructure over people engagement and 29% had 'how to get here' information.

Surprisingly 69% of municipalities provided a link to a Google map, which is terrific, yet only 24% of businesses who need to drive the sale did so. Despite very high levels of resident travel, it is risky to assume everyone knows where all communities are located or know how to find a business.

This assessment revealed that tourism businesses have capacity to welcome more guests - a mobile friendly and responsive web presence is essential to contributing to that goal.

Facebook, TripAdvisor and Blogs: Operators

The potential to use mega social media tools such as Facebook and TripAdvisor creates opportunity and angst for tourism businesses. The reality, however, is that we are in a world where, increasingly more, the traveller finds benefit in browsing key social media sites to inform their travel decision-making. To not be in the conversation is a missed opportunity. To allocate the staff or volunteer time to engage in the conversation is important - the frequency can be controlled by the business.

The majority of tourism businesses are not leveraging the power of TripAdvisor or Facebook with their guests and prospects. Only 16% have a TripAdvisor account, 24% a Facebook business account and where companies have these accounts, they are not linked together with their website to make it easier for the traveller to find additional information quickly and easily.

On TripAdvisor few businesses post professional photos of their infrastructure, activities or guests (8%), and very few visitors have uploaded their own photos - which can be encouraged by the business with their guests. For those with accounts however, very few are engaged in responding to their guests after the guest posts a comment with any acknowledgement or feedback - rather it is a one-way conversation where the guest takes the time to share their thoughts and the business do not engage. Engagement levels are higher with Facebook with 45% offering special events, 98% posting photos, 11% posting videos, but only 3% using engaging contests or 5% providing special offers.

The voice of the customer continues to grow on online channels. It is imperative for tourism businesses to determine which conversations they will benefit from the most by committing to a regular, ongoing engagement with travellers.

Opportunity/Recommendations

1. **EDMO & HNL:** Use the 2013 data produced from this study on tourism business and municipal websites as a benchmark to set 3-year targets to improve performance in all categories.

Mobile Friendly and Responsive Websites: Tourism Businesses and Municipalities

2. **Operators:** The low hanging fruit for the summer of 2014 is for operators to audit their website and ensure the basic, expected elements are there - most importantly mobile friendly, a clear call-to-action, a Google map link, and an ability to talk to a person year-round and make a reservation. The best experience may exist, but if a traveller can't book they can't buy - particularly non-resident travellers who are not familiar with all the businesses and may be travel planning during closed or shoulder season. For the fall-winter of 2014-2015, operators should examine their budget to determine where strategic and prioritized investments in time or money to improve their online presence can be made.
3. **Municipalities:** Building a 'tourism website' is not recommended, for this is not the core business of a municipality; rather ensuring a tourism webpage exists with links to tourism businesses in your community and ensuring these websites remain up-to-date is key for those that have a tourism web-page, ensure the link to the provincial tourism website (www.newfoundlandandlabrador.com) is well positioned, along with links to the community tourism businesses.
4. **Operators, Municipalities & EDMO:** Visit the provincial YouTube channel (http://www.youtube.com/user/NewfoundlandLabrador) and the Canadian Tourism Commission (http://www.youtube.com/user/canadiantourism) to determine if there are any videos that are aligned with your product, story, community or region that you can hyperlink, to add high-quality, professionally produced videos to your website. As new photo shoots are set by the province or CTC - the EDMO should ensure operators in their region are made aware of these opportunities.
5. **Operators & Municipalities:** Invest in high-definition images that portray the emotional and physical connection - the people, places, and ways the guest can engage.
6. **Province, HNL & Others:** Revisit the content for online training programs being offered to ensure they are reaching the operators most in need, and if needed, target the invitation to engage a larger percentage of operators. Also, ensure the program leads to some tangible results - potentially through an incentive program whereby if X % of the objectives are implemented, Y% of the course fee for participation is returned to the individual/business. The more operators who choose to engage, the more this contributes to the provincial marketing voice.
7. **IBRD, HNL, TCR, ACOA & EDMO:** Ensure operators are aware of the existing programs that would assist them in creating a basic professional mobile friendly and responsive website or a more affordable internally produced Word Press or equivalent site. Further, ensure operators are aware that having an online presence is a requirement of the Newfoundland and Labrador Tourism Assurance Plan and therefore vital if they are to be included in provincial marketing and promotional initiatives and membership/partnership with the provincial Destination Management Organizations or Hospitality Newfoundland and Labrador. Essential to this program would be access to training to ensure once a physical site exists; the commitment and skills are there for basic updates (text, images, and videos) on an ongoing basis.

Facebook, TripAdvisor and Blogs: Operators

8. **Operators & EDMO:** Ensure there is an ongoing effort to gather targeted information from your guests. For example, in the summer of 2014 the EDMO, on behalf of operators, could create a small survey that is administered to guests either at the time of reservation or departure that asks which social media channels they use. This can be a simple pen/paper tracking by the cash register, an excel sheet on the computer - it doesn't have to be costly, rather a commitment. At the end of each month assess where the visitor is online for YOUR business (e.g. your website, Facebook, TripAdvisor, Pinterest, Google+, Twitter). Use this information to commit to one or two online channels that you can learn to optimize and commit the time to remain in the conversation.

9. **Province, HNL & Others:** Revisit the training programs being offered to ensure they are reaching the operators most in need, and if needed better target the invitation to improve participation and engagement. In particular this training must address the fear of the unknown, online time management with communications, responding to negative and positive comments, how to use the sites to drive the conversation and, as appropriate, the sale.

This recommendation supports Goals 3.2, 5.1, 6.1, 6.3, 7.1 and 7.2 of *Vision 2020*.

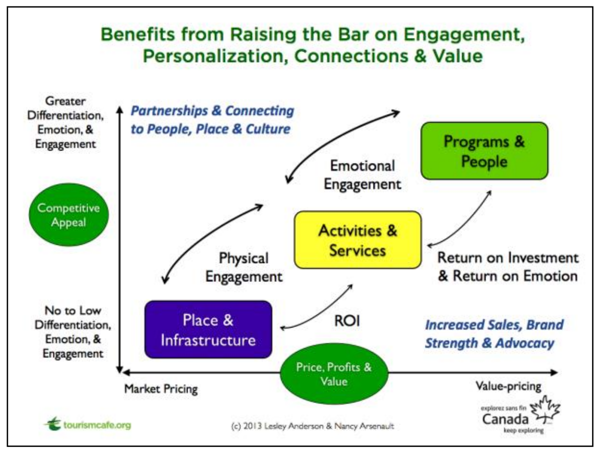
Finding #7: The destination will benefit from a richer inventory of program based providers that can actively engage guests, deliver authentic, personalized experiences and command a higher price or value proposition while increasing the return on emotion (ROE).

There is a strong base of place and infrastructure (trails, parks, attractions, hotels, restaurants, etc.) in the Eastern Region, which is attracting visitors. There is an opportunity to increase the differentiation, emotion and engagement by identifying and involving unique local characters in the tourism mix.

Identifying a community's 'hidden gems' or the programs and people (storytellers, musicians, interpretive guides etc.), and bringing them into the tourism activities, as direct providers, or in partnership with an existing tourism operator, will extend the depth and breadth of visitor opportunities.

Opportunity/Recommendations

1. **EDMO, Operators, Municipalities, HNL & TCR:** Facilitate a process that will identify new experience based providers (story tellers, musicians, interpretive guides, artisans) and then present them with the opportunity associated with getting involved in tourism (income opportunity), equip them in ways to deliver their unique offering and connect them with traditional tourism providers who in turn will utilize their services; consider issuing a "call" for local tourism talent and partner with local and provincial arts councils/groups.
2. **TCR:** Consider enhancing TDMS with new variables. See recommendation 18.



These recommendations support Goals 4.1 and 7.1 of *Vision 2020*.

Finding #8: Activity based experiences should be encouraged to broaden their product offer to appeal to more diverse and ever evolving traveller types.

Activity based for profit, not-for-profit and government tourism operators must embrace the reality that in order to remain competitive the product and experience must evolve. It is imperative to proactively respond to the changing dynamics of the traveler, which for example would be identified in EQ profiles, by investing time in developing creative and innovative visitor experiences that utilize existing assets and new natural and built assets available in and around the locations of these operators.

Opportunity/Recommendations

1. **EDMO & HNL:** Facilitate sessions with operators who are located in close proximity to high interest activity based businesses and develop strategies that layer additional visitor opportunities onto existing core attractors. This offers potential to extend length of visitation. Ideally build new programs that encourage overnight stays.
2. **Province IBRD, TCR & ACOA:** Explore establishing an Experience Development Investment Fund for private sector operators who can apply for seed funding for new experience development.

3. **TCR, ACOA, HNL, IBRD & EDMO:** Assist operators that generate demand for the region to increase their competitive position and visitor appeal by ensuring they have the research and best practice tools to respond to changing customer and market dynamics.

This recommendation supports Goal 4.1 of *Vision 2020*.

Finding #9: There is an opportunity to improve the food and beverage options in the Eastern Region but the owners/operators' face a number of challenges.

An essential, social and enjoyable activity when travelling is eating! Beyond the survival requirement, experiencing the culinary delights of a region provides the destination a way to connect guests to the food traditions and tastes from the region. Culinary tourism is now an established movement within the tourism industry and many national, regional and local tourism jurisdictions have active culinary tourism development strategies in place to ensure the taste experience contributes to the memories of a traveller's journey.

While many food and beverage (F&B) operators in the Eastern Region use local foods and authentic Newfoundland recipes the F&B experiences offered, for the most part, do not align with visitor expectations. This is not an easy situation to remedy as F&B operators face a number of challenges, the most significant being finding qualified kitchen staff.

Opportunity/Recommendations

1. **EDMO, TCR & HNL & Restaurant Association of Newfoundland and Labrador (RANL):** Celebrate and promote the availability of local food and beverage options available to guests and at the same time encourage more F&B providers to adopt this approach in the preparation and delivery of their F&B experience; learn practices from others like the Ontario Culinary Tourism Alliance www.ontarioculinary.com.
2. **HNL, RANL, Bonavista Institute for Cultural Tourism, TCR, Educators & F&B Operators**: Immediate attention needs to be directed at identifying and understanding the challenges facing the F&B sector in the region and the impact these challenges are having on the guest experience. With this understanding immediate steps must be identified and actions implemented to address areas of concern.
3. **TCR, RANL & HNL**: Review the data collection form F&B operators used to populate the E-Dining database and where feasible remove areas where ambiguity is present. For example ask operators more specific questions, and provide better definitions, in order to ensure accurate information is provided and therefore can be passed on to guests.

This recommendation supports Goals 4.1 and 4.2 of *Vision 2020*.

Finding #10: Expand the number of authentic retail establishments that celebrate local artisans and crafts people and connect travellers to the hidden gems in the rural area.

Finding that ideal souvenir that reinforces the positive memories from a vacation is an important memento for travellers. This goes beyond cute or kitschy souvenirs or memorabilia to the ability for visitors to have the option to purchase quality goods that are reflective of an authentic Eastern Newfoundland experience. If the visitor can connect with the locals in the process or the retail products are woven into the story, or the travel journey - even better.

Opportunity/Recommendations

1. **EDMO & Provincial Organizations:** Foster the development of initiatives, such as developing an artisan experience category that develops new visitor opportunities and is aligned with the quality standards of the Craft Council of NL, Crafts of Character Certification[17]. On a regional basis, form an implementation task team to focus on the development of additional artisan/crafts people

[17] http:www.craftcouncil.nl.ca

experiences throughout the region. Leverage the exploratory work that has started on the Discovery Trail.

2. **EDMO, IBRD & TCR:** Partners should connect with the Craft Council to ensure the opportunities for tourism and artisan sales are leveraged for the benefit of the artist and visitors.
3. **Operators:** Capitalize on the talents of local artisans and facilitate the development of hands on guest learning experiences at studios, galleries, and retail shops located throughout the region.
4. **Retailers:** Travellers with limited space and/or weight restrictions will factor in the size, shape and/or weight of their purchases. Considering this, and how you can respond, is important. For example, be cognizant of the luggage size and weight limitations and ensure you have product, at various price points that can be 'tucked into the luggage' and if not, shipping options for larger items can be accommodated. For small operators, this could be as simple as securing price guidelines from Canada Post that will enable you to create a shipping price list, then benchmarking against the actual cost of shipping to see if you need to amend your prices. A further consideration for post-trip gallery items should adhere to customer regulations.
5. **Retailers:** Connect the local, authentic products to the artisans through small cards, brochures, or QR codes that tell the story of the craftsperson and their connection to the community.

This recommendation supports Goal 4.1 of *Vision 2020*.

Finding #11: Accommodation capacity variances throughout the region, particularly during the high season, are impacting the potential for the visitor economy.

Roofed accommodation occupancy data for the region suggests there is sufficient accommodation capacity, especially when compared to provincial and national averages.

Yet regionally Eastern NL is challenged in some communities (i.e. Trinity, Bonavista, Ferryland) with accommodators who reach high-season capacity but tourism demand generators who are not realizing their full visitation potential because guests who have a desire to visit can't secure accommodations (e.g. Rising Tide Theatre, Colony at Avalon).

Conversely, other communities have limited or no accommodation options yet significant tourism attractions that cannot realize their visitor potential because of the lack of accommodation options (e.g. Winterton's Wooden Boat Museum, Fortune Head Ecological Interpretive Centre). This limits growth in day trips therefore, affecting the economic impact and sustainability of other businesses and the potential to those communities are reduced dramatically.

It is also important to flag that for some accommodators, the oil and gas industry is becoming a valuable client for their property providing long-term, block business at a good rate. This however, diminishes the inventory available to visitors.

Finally, anecdotal evidence obtained during the public consultation sessions suggested there are a substantial number of unlicensed accommodation operators doing business in the region. Of concern is the guest experience and legal implications. Unlicensed operators may not adhere to provincial accommodation guidelines, business operating criteria and quality standards, therefore, offering visitors a sub-standard accommodation experience leads to unhappy customers. In this competitive tourism marketplace this must be avoided.

Opportunity/Recommendations

1. **EDMO, Operators**: In areas where accommodation options are limited in high season the EDMO facilitates planning of itineraries with the local tourism operators in order to develop options that invite visitors to the primary demand generator and simultaneously encourages travel to another area where other attractions and vacant accommodations exist. For example, visitors will be drawn to the Colony of Avalon to experience the archaeological dig site where accommodations are limited yet this is the demand generator. This site can draw visitors to the sub-region but they would then return to St. John's because of the limited accommodation options in high season. However, in the planning phase, if the visitor knew there were other attractions to see like Mistaken Point ecological

reserve in Portugal Cove South they may choose to continue their journey to that community where accommodations may be available, even in high season.

2. **Operators:** Creative packaging between hoteliers and the major attractions should be encouraged. Whether the motivation is the attraction – and accommodations are an option, or the motivation is to 'get away for the weekend' and enjoying the local area sites enhances the visit – helping the visitor link accommodations to activities is important.

This recommendation supports Goal 4.1 of *Vision 2020*.

Finding #12: The majority of cultural, heritage and natural tourism assets and not-for-profit operations are challenged with ongoing sustainability.

Articulating the cultural stories of the Eastern Region is an essential piece of the visitors' experience and one that appeals to visitors to the region. These narratives are primarily being communicated at cultural and historic sites throughout the region. While national and provincial sites seem to have sustainable funding models, smaller not-for-profit community based sites are experiencing significant challenges to keep the doors open. Of primary concern is finding resources for day-to-day upkeep of the sites. While public funding is essential, operators must also strive to deliver visitor experiences that offer varying degrees of engagement and can be sold at different price points. They must diversify their programs and activities to add differentiated visitor experiences designed to generate new revenue and increased value.

> *Cultural tourism is a rapidly growing sector of the global tourism industry, averaging 15% growth per year as travellers seek out new learning and entertaining experiences that are unique to the place they are visiting.*
>
> *Bonavista Institute for Cultural Tourism*

Opportunity/Recommendations

1. **TCR, Province, Municipalities & Funding Partners (e.g. IBRD, ACOA):** The public, and in certain cases private sector, must invest financially to ensure the sustainability of cultural, heritage and natural assets by continually exploring opportunities for strategic investment in tourism attractors that deliver economic impact to local communities. Funding should favor:

   (a) Refocusing or repurposing existing infrastructure and retaining the authenticity of existing facilities over investing in new infrastructure (unless it is cost-prohibitive),

   (b) Supporting organizations that have clear mandates, strategic/business plans, follow industry standards and demonstrate their willingness to provide a range of place based, activities and programs that command a set of differential fees for mass to niche market experiences,

   (c) Requests where critical mass can be influenced,

   (d) Projects that demonstrate willingness to create multiple revenue streams such as competitive admission rates and program fees over those that are focused on just the physical assets and non-revenue generating visitor activities.

2. **Not-for-profit Operators:** There are financial limitations and realities related to sustainability of the cultural, heritage and natural assets; not all assets have the potential to deliver experiences guests are seeking and expect; the reality is that these assets will need to evaluate their viability against the backdrop of current and future visitor expectations. Hard decisions will need to be made; some may conclude they are no longer viable. Limited investment dollars therefore, can be targeted at those assets that generate the greatest return on emotion (ROE) and return on investment (ROI) to the visitor, the community, and the region.

3. **Province & Not-for-profit Operators**: Undertake a critical review of current operations in order to ensure sustainability strategies are in place, for example:

   (a) Assist operators to strategically make the shift from presenting culture, heritage, and natural products to staging, engaging, unique experiences that often require a greater investment of time, relationship building, and crafting the experience based on knowing the characteristics of various traveller types. Operators are encouraged to leverage available experiential travel training opportunities.

(b) By 2015 invest in ensuring visitors have options for on-site interaction through programming that brings to life the stories of NL through the characters (e.g. photographers, artisans, retired school teachers, musicians, fishers) within a community combined with new story telling technologies that rely on QR coding and audio story telling for example.

(c) Teach how to cost and price visitor programs in ways that cover development, marketing and delivery, and generate a profit.

(d) Set targets to incrementally offer new visitor experiences that charge core admission fees, plus special auxiliary program fees for enhanced experiences that provide high value to the visitor.

(e) Review the various seasonal employment grants available to not-for-profit operators to ensure they are set up to help operators succeed over the long-term. For example, operators report that the 10-week Job Creation Partnership (JCP) program is not helping. Another model should be considered, one that sees staff trained properly for a potential long-term job or multiple seasons, instead of a short-term fix to a staffing challenge.

4. **Province, EDMO, TCR, IBRD, ACOA & HNL:** Build capacity for product and market development of not-for-profit operators through training programs such as the Bonavista Institute for Cultural Tourism and GMIST's experiential travel training, product coaching, and seed funding for new activity and program-based visitor experiences that can demonstrate a positive ROI and forecasted ROE.

5. **ACOA:** Consider a Best Practice Mission that takes non-profit operators to a region where attractions demonstrate success through self-funding strategies.

This recommendation supports Goal 4.1, 4.2, 7.1 and 7.2 of *Vision 2020*.

Finding #13: Enhance the visitor planning and journey to the Eastern Region by proactively communicating the limited transportation options available within the region and harmonizing the way-finding experience.

Visitors from the St. John's region represent the primary source of visitors to the region. Continued efforts are being made to attract more flights and attract non-resident travellers to Newfoundland and Labrador. Visitors arriving by air increased by 33% (226,900 in 2003 to 359,100 in 2013) and expenditures rose 59% (from $244.7M in 2003 to $358.2M in 2013) in the last decade.

The Eastern Region faces a challenge with the very limited ground transportation options available to visitors arriving by air or watercraft (ferry or personal) and limited mass transportation options to the region. So, while guests are arriving the question remains - can they get to the numerous communities?

While current way-finding exists, industry stakeholders confirm it is aged and inadequate. The 2011 Tourist Signage Study confirmed that new policies are needed to: reduce visual clutter along the highways, provide directional and/or distance information, use consistent formatting using letters and/or symbols that communicate messages quickly and clearly, improve vehicle and pedestrian safety, conform to national and international standards, be client driven, improve access, enhance experiences and increase visitation. This policy approach should be augmented from an investment in signage to including online way-finding support.

Opportunity/Recommendations

1. **Municipalities:** To enhance the consistency for visitors navigating their journey through the Eastern Region and to harmonize the visual cues, municipalities that have not yet incorporated policies for Tourist Oriented Directional Signage (TODS) should do so sooner, rather than later.

2. **Operators:** Ensure your business is identified on Google Maps and this locator is on your company website and linked to your Facebook and TripAdvisor accounts.

3. **Operators:** Ensure your website has an informative "Find Us" page that includes links to the Google map, 'finding us' directions from major arteries into the community - including visuals of key signs that would help the visitor know they are in the right place, and give them clues for the sign they are looking for.
4. **TCR & Operators:** Ensure the marketing materials transparently communicate the limited transportation options available to guests (e.g. car rental, mass transit, tour operators) when visiting the region. Include key decision-making insights such as reservation times for high/low season, web-links to transportation providers and schedules that will speed up the time for visitor's trip planning their ground transportation needs.
5. **EDMO:** Act as a catalyst for connecting taxi companies and their drivers to the potential to secure new business, specifically with non-resident travellers by introducing a "Driver-Guide Product" for FIT and conference visitors. As well, ensure that non-resident travellers are aware that securing a taxi driver who will travel one to two+ hours from St. John's into the Eastern region is a real option.

This recommendation supports Goals 2.1 and 2.2 of *Vision 2020*.

Finding #14: Strengthen the results for high season before diversifying resources to expand into shoulder seasons.

NL positions itself as a multi-season destination. Eastern Region's greatest contributions are between June and September relative to the culture, nature, activity based business, and conference facilities.

Even though 81% of the hotels operate year round as do 46% of the B&Bs, the ability to draw non-resident travellers or resident travellers in the off season is limited because only 25% of activity based operators and 36% of the shopping/retail businesses are open year round. However, 42% of the activity-based operators operating 6 months of the year and this represents a good focus, for there is a draw for the visitors beyond an accommodations get-away.

Opportunity/Recommendations

1. **TCR, EDMO & Operators:** Focus for the short-term in attracting visitors in the June - Sept period to optimize the viability of all businesses during this core period.
2. **TCR, EDMO & Operators:** In planning for the long-term and increasing benefits to the 19% of operators who are open at least 6 months, *seasonality extenders* such as creating a new strong regional demand generator, special offers, a trade show, and unique packages targeted to specific traveller types or niche markets like pre/post programs for St. John's conference delegates should be explored.
3. **TCR, EDMO, HNL & Operators:** Provide opportunities for Best Practice Missions for organizers, operators, volunteers, community groups and key champions to attend current successful events in other regions of the province and provide training in festival and event management.

This recommendation supports Goals 4.1and 6.1 of *Vision 2020*.

Finding #15: The role of all Visitor Information Centres and the contributions of staff should be reviewed to ensure their contributions to the visitor's experience and travel journey are optimized.

The role of Visitor Information Centres (VIC) and call centres remains a vital element of the visitor experience in pre-planning and while in the destination. Across Canada there is increasing interest in examining the potential for contribution to revenue generation through any number of activities. For example, providing online bookings for visitors, increasing the responsibility for contributing to the visitors' story through an active role with Facebook, Twitter, and using technology to aid the traveller, while continuing to provide the human interface in the destination; an important element of the visitor experience.

Opportunity/Recommendations

1. **TCR, HNL & EDMO:** Review the roles and responsibilities of the provincial and regional VIC's staff and volunteers[18] to determine where the investment could yield increased results. A provincial led initiative, in collaboration with the communities that supports regional VICs could include: the differences and similarities of provincial and regional VICs, role profiles of staff and volunteers, hiring a mix of staff with a variety of online and face-to-face skills and investing in training that helps staff, supervisors and volunteers understand the shift from a service economy (e.g. providing information) to an experience economy and exploring all ways to enhance their journey (e.g. print materials, online support, facilities to charge their electronics, etc.).
2. **Provincial & Regional VICs:** As a traveller does not know which VIC is funded provincially or regionally, it is important that there is a harmonized experience and commonality in service delivery within all VICs. Ensuring access to training materials, being part of the experience category development, and having access to the visitor insight research is just as important as is knowing the local tourism business

These recommendations support Goals 4.2, 6.3 and 7.2 of *Vision 2020*.

Finding #16: The availability of qualified staff will continue to be a challenge; seeking shared solutions should be explored.

The human resource challenge facing Newfoundland and Labrador is not unique; all other provinces are facing the same core issues of ensuring the availability of qualified staff for seasonal and year-round operations. Unfortunately NL is projected to have the highest labour shortage in tourism by 2030 (17%) of any other province. While concerted efforts are being made by the CTHRC, educational institutions, governments and businesses, this challenge will not be going away due to an aging population, low birth rates, phased and early full-time retirements and the appeal of working in tourism.

Employers are going to have to reassess their current practice and business model to find creative new techniques. Key to this will be the concept of shared resources - be they staff or contracted.

- **Examples A**: Staff sharing between operators in shoulder seasons (e.g. an employee works for company A 50% of the time, company B 50% of the time) and both have decreased off-season operational hours - but can remain open for partial business.
- **Examples B:** Hotels closing 'rooms' and restaurants closing 'sections' to keep and maintain minimal business levels, but they plan their revenues for lower volumes for parts of the year.
- **Examples C:** Become an '*employer of choice'.* By creating such an ideal working situation staff want to stay with your company, over others. This could be linked to creative employment conditions that understand the life-stages of different people (e.g. 18 - 25 vs. 55 - 65, or 65+), creative schedules, more people, but less/shorter shifts.
- **Example D**: Divide up targeted auxiliary responsibilities and train individual staff to lead this role (e.g. updating websites or social media) so the training investment is smaller per person and/or consider sharing skill sets between like-companies on a staff or contractor basis.

Opportunity/Recommendations

1. **EDMO & HNL:** Develop a cadre of experience providers (e.g. musicians, storytellers, guides, artisans) that are interested in casual or occasional tourism opportunities. These individuals would likely be more mature individuals (50+) and willing to work on contract and occasional schedule for pre-planned business. There may be opportunity to leverage youth workers who have specific expertise.
2. **EDMO & HNL:** Host a business brainstorming session to discuss creative, shared solutions to staffing.

[18] Note that in some smaller Eastern communities the VICs are operated by volunteer board who hire summer students to operate the centres. Targeted involvement with at least one representative per VIC will be important to consistency, from a visitor perspective, within all VICs.

3. **Province:** Continue to invest in developing the potential of the mature labour market, the "Targeted Initiative for Older Workers" program for example is working according to some stakeholders. Youth retention activities also provide another opportunity. Consider developing a special purpose businesses incentive program or tax credit for training and retaining mature (50+) staff/volunteers.

These recommendations support Goals 7.1 and 7.2 of *Vision 2020* and ties into the provincial workforce strategy efforts.

Finding #17: There is a scarcity of information relating to the protection of the natural environment in developing and managing the Eastern Region as a tourism destination.

The *Vision 2020*, Goal 4.3 focuses on being a visible leader of environmental sustainability, however, there is limited evidence of major initiatives relative to the visitor experience in this area with one exception: The Eastern Newfoundland Geotourism project.[19] It seeks to celebrate the Eastern Newfoundland region as a world-class destination, while contributing to the economic health of the region by promoting sustainable tourism.[20]

The Geotourism project has not gained traction within the region and the EDMO and the Geotourism Stewardship Council are currently evaluating the value of the initiative. Given the investments made to date, the potential for developing experience categories with a geology story is worth pursuing. The ensuing payback will come as visitors seek out those sites that apply and reinforce sustainable tourism practices.

Geotourism is not only about geology, it is about geography. The principles of geotourism are about sustainability and are defined as *tourism that sustains or enhances the geographical character of a place—its environment, culture, aesthetics, heritage, and the well being of its residents.*

The region relies on its natural assets as a primary motivator for travel. Sustainable asset management practices must be implemented where they do not exist in order to protect these assets for years to come. Issues such as competing land-use, impacts of industrial development on tourism, and protecting the natural coastlines are vital to NL's tourism industry. Investments in major visitor centric initiatives like the East Coast Trail and the Discovery Trail Geopark do support responsible tourism development practices. Tourism leadership within the region must continue to follow the foundations of this strategy.

Opportunity/Recommendations

1. **Tourism Board:** Consider broadening Goal 4.3 within *Vision 2020* from being a leader in environmental sustainability, to one that acknowledges the three core elements of sustainability: People, planet and profits. In support of this, formally acknowledge and align with the 2005 TIAC/Parks Canada Canada's Code of Ethics and Guidelines for Sustainable Tourism as a foundation that balances economic objectives with safeguarding and enhancing the ecological, cultural and social integrity of Canada's heritage.
2. **EDMO, HNL & TCR:** Take a leadership role in recommending that operators and TCR adopt the 2005 TIAC/Parks Canada Canada's Code of Ethics and Guidelines for Sustainable Tourism, which HNL adopted in 2006, as a foundation for thinking about their commitment to sustainability. Encourage them to communicate their position relative to sustainability to visitors on their website.
3. **EDMO:** Take a leadership role in evaluating the opportunities associated with the Eastern Newfoundland Geotourism project. If, at the conclusion of the evaluation, the EDMO Board and staff see opportunities associated with this affiliation they a) ground destination development against the foundational truths of Geotourism and b) take proactive steps to roll out Geotourism principles and

[19] Geotourism is defined as tourism that sustains or enhances the geographical character of a place—its environment, culture, aesthetics, heritage and the well being of its residents. Geotourism incorporates the concept of sustainable tourism—that destinations should remain unspoiled for future generations—while allowing for ways to protect a place's character. Geotourism also takes a principle from its ecotourism cousin—that tourism revenue should promote conservation—and extends it to culture and history as well, that is, all distinctive assets of a place

[20] National Geographic Eastern Newfoundland Geotourism MapGuide website; http://www.nlgeotourism.com/about.php

practices to stakeholders within the region in order that they begin to embrace this thinking in their operations;

4. **EDMO & Operators:** In developing the thematic visitor experience categories consideration must be made to the traveller's journey. A starting point is to identify where there is opportunity to focus on the local area people and place as a unique and authentic differentiator that delivers on the travellers desire for "A deep emotional motivation to experience new people, cultures, and place," and responds to demand for unique, high-quality experiences, even at a premium price for cultural and natural activities.[21]

5. **TCR, IBRD, ACOA & Municipalities**: Ensure the ability to demonstrate a commitment to sustainability (people, planet and profits). Specifically, infrastructure projects (new or restored heritage and trails) provide evidence of raising the bar on the visitor experience by identifying the activities and programs for target markets that will generate demand at a higher fee for the experience. This could involve a review of, and amendment to, funding applications. Higher priority should be given to projects that demonstrate this commitment in the Eastern Region.

6. **HNL, TCR & Province:** Revisit the concept of developing a tourism resource management set of guidelines or principles to ensure the protection of high-value tourism assets and the economic value they bring to the province.

These recommendations support Goals 4.1 and 4.3 of *Vision 2020*.

Finding #18: There is a rich resource of research, studies and plans that should be explored for future projects before further investment is made.

The depth and breadth of information available to decision-makers is vast (with the exception of data pertaining to sustainability and management of natural resources, as stated in Finding #17) - from formal high quality research produced by the province, the Canadian Tourism Commission, TIAC, to association materials and project specific documents developed by any number of experienced professionals. Current documents, which are now organized and documented and residing with the province, should be consulted first so priority investment can be focused on actions as opposed to more studies.

Opportunity/Recommendations

1. **Anyone looking to invest in a new report/study:** Review the document bibliography created for this project to first determine if information already exists that could inform decision-making and future investment of other actions.

2. **EDMO, HNL & TCR:** Continue to update the resource bibliography with new studies and research that emerges allowing this to remain a living resource from which stakeholders can benefit.

These recommendations support Goal 3.1 of *Vision 2020*.

Finding #19: Enhancements to the TCR Tourism Destination Management System and Restaurant Association of NL's E-Dining database could be made with additional visitor appeal variables.

The tourism industry relies on the Restaurant Association of NL's E-Dining database to communicate the food and beverage options available to guests. This database is populated by individual businesses, but there was disparity between what was reported for food options vs. what stakeholders described as options within the restaurants. Most specifically, for vegans and vegetarians the fact a salad exists on the menu does not make it a restaurant that offers this type of food preference. As food options (gluten free, heart healthy, smaller senior's portions) become increasingly important, businesses should respond by making these available if they want to attract a more diverse customer base.

> *Creativity is expressed by our people - the characters, their attitude, their humor and storytelling, their ingenuity. It is expressed in our culture - everything from the houses painted different colours to the music, art and texture of the place. And it's expressed in the fierce beauty of our natural landscape.*
>
> *Noel O'Dea, President Target Marketing*
> *Quote: www.progressmedia.ca*

The Tourism Destination Management System (TDMS) is a sophisticated tool that allows tourism businesses to annually input information about their

[21] Government of Newfoundland and Labrador (2009). *Uncommon Potential: A Vision for Newfoundland and Labrador Tourism.*

business that translates into online marketing opportunities and provides the province and visitors with important information about the company. Principally designed to capture information relevant to consumers, it is also a source of business-to-business insight for product partnering, packaging, the travel media and travel trade. As business is encouraged to raise the bar with experiences that command a higher price point - access to experience providers (program based operators/individuals) that can provide this service to a hotel, tour operator, park, festival, restaurant, museum or heritage site becomes valuable. Currently this type of information is not captured in TDMS.

Opportunity/Recommendations

1. **TCR:** Consider adding program-based variables to enable experience providers to be captured in the system. Some may have a direct consumer offer (e.g. artisans, musicians); others may merely provide a business-to-business opportunity (e.g. storytellers, fishers, elders) that could add value to product development that requires people engagement to raise the bar on the visitor experience.
2. **TCR:** Anecdotal insights indicated that if the user experience for the TDMS system was enhanced it would increase the number of operators who use the system, and reduce the time it takes them to update their data.
3. **Restaurant Association of NL**: Consider enhancing the descriptions attached to core variables such as vegan, vegetarian, heart healthy foods, etc. to ensure when operators indicate 'this is available' it meets the expectations of the customer.

This recommendation supports Goal 3.1 of *Vision 2020*.

Finding #20: Amend five *Vision 2020* goals to optimize the investment focus needed to achieve the desired outcomes.

Five of the *Vision 2020* strategic directions are now five years old and a few of the original goals are narrow in scope. This could limit the priority for investment as the government and industry collaborate on doubling tourism revenues in NL.

Opportunity/Recommendations

1. **Tourism Board:** Consider amending five *Vision 2020* goal statements as follows:

Goal 3.1

- From: Develop and implement a research strategy and plan that provides industry and government with relevant and timely information and analysis.
- To: Develop and implement a research strategy **and target investments towards research** that provides industry and government with relevant and timely information and analysis.

Goal 4.1

- From: Develop and implement an experience strategy that resonates with sophisticated travellers, reinforces our unique brand, and increased our return-on-investment
- To: Develop and implement an experience strategy that resonates **with non-resident and resident travellers,** reinforces our unique brand, and increases the return-on-investment for businesses and the return-on-emotion for visitors.

Goal 4.2

- From: Continue to improve government-owned tourism infrastructure.
- To: Continue to improve **the visitor economy by improving the infrastructure, activities and programs that will increase the appeal of the destination.**

Goal 4.3

- From: Be a visible leader of environmental sustainability.
- To: Be a visible leader of **responsible, sustainable tourism development focused on people, planet and profits.**

Goal 7.2

- From: Focus on efforts on attracting and retaining a skilled tourism workforce.
- To: Focus on efforts on attracting, **training,** and retaining a skilled tourism workforce.

This recommendation supports the overall ability for *Vision 2020*'s product development objectives to be realized.

4. Informing the Findings

A Compelling Destination with Significant Tourism Assets

The Eastern Region has long been an appealing tourism destination attracting thousands of visitors annually from near and far. Comprising countless picturesque towns and villages and breath taking landscapes, the region is situated over a vast geographic area from Northern and Southern Avalon to the Burin and Bonavista Peninsulas.

The region consists of five distinct tourism sub-regions; the Baccalieu Trail/Admiral's Coast, Irish Loop, Cape Shore Loop, Heritage Run and the Discovery Trail/Osprey Trail. Each of these sub-regions offers their own brand of Newfoundland charm and hospitality with travel opportunities designed to engage guests in a series of memorable experiences that will last a lifetime.

The *Legendary Coasts* aptly describe the Eastern Region. Anyone who has spent any time in Eastern Newfoundland recognizes the significance and power of these words. While this new positioning at first blush may lead to thinking about the natural sights found in the region, if one takes the concept of legendary and applies it to the stories, people and legends in its interpretation it will be even more powerful. The tourism operators of the region, those men and women, young and old, who display a passion for the place they call home in wonderful and unique ways. From warm and welcoming smiles to offering comfortable services and amenities the people of the Eastern Region create a backdrop for truly memorable experiences.

The Eastern Region is rich in a history that began when Italian explorer Giovanni Caboto (or John Cabot as he is locally known) first discovered North America in 1497; his first words were "O buono vista!" When translated into English, this phrase means, "Oh happy sight!" which is certainly fitting for what would become the town of Bonavista, the historic site of Cabot's landing.

The region boasts Canada's first English colony at Cupids, a village that celebrated its 400th birthday in 2010. Ferryland is where George Calvert, better known as Lord Baltimore, founded the Colony of Avalon in 1621. Today, visitors peer over the shoulders of working archaeologists as they uncover the foundations of houses and cobblestone streets, built in the 17th century.

For naturalists, a long list of unique attractions and sights can be found including Cape St. Mary's Ecological Reserve, a wonderland for birdwatchers and explorers. Thousands of gulls, razorbills, common murres, black-legged kittiwakes, northern gannets, and double-crested and great cormorants nest here. In Elliston, at the Puffin Ecological Site guests get up close and personal with the world's largest Puffin colony.

In addition, some of the geological wonders of the Eastern Region have world acclaim. For example, in Fortune at the Fortune Head Ecological Reserve, geologists from around the world have recognized the area as the best place on the planet to see the fossils that tell this early story of evolution. The Mistaken Point Ecological Reserve, near Portugal Cove South, contains the oldest and largest known fossils in the world of complex, multicellular organisms from 579-560 million years ago.

With thousands of kilometers of trails hikers have an endless list of routes to explore including the East Coast Trail a coastal hiking experience that goes to the outermost reaches of North America. This wilderness hiking trail provides hikers with a special blend of wilderness adventure, outstanding natural beauty, wildlife, history, and cultural contact.

In the context of destination development to say the Eastern Region is starting from a position of strength would be an understatement.

The region possess a diverse array of foundational tourism assets that could be the envy of destinations twice its size. Undertaking this proactive region-wide tourism destination development process, one that is focused on the visitor appeal, will only serve to increase the destinations appeal and competitiveness over the near and long term.

Reinforcing a *REGIONAL vs. SUB-REGIONAL* Approach

The scope of the assessment is regional and driven by actions and recommendations that can optimally drive visitation, enhance collaboration and create new visitor experiences throughout the entire region. While it is tempting to only consider a single business or sub-region, visitors' focus on their journey, their trip, the range of things they like to do when they travel. Operational geographical borders are not important to them, nor does it matter if the business is for profit, not-for-profit, or government owned and operated as long as they receive value for their tourism dollars.

The authors of this assessment suggest that a strong sub-regional approach or focus on a type of business (for profit vs. not-for-profit) limits the potential for growth. Collaborating to compete requires a holistic approach to working together with the visitor at the heart of decision making. By stepping into the shoes of the traveller and seeing the region through their eyes will provide demand side rather than supply side perspective.

4.1 The Tourism Barometer

> *Many Canadian companies choose to do business in the same markets they've operated in for years … Working with familiar clients and markets is a comfortable option, and in the short-term, it may reduce risk … but over the long term, playing it safe can cause companies to loose their edge.*
>
> *Deloitte's Passport to Growth (2013)*

Over the past six decades, tourism has become one of the largest and fastest growing sectors in the world.[22] In Canada tourism is an $81.7 B dollar industry (2% of GDP), generating $21.3 B in tax revenues, employing more than 609,500 people in over 157,000 businesses. In NL tourism generates just over $1 B in 2012, represents 1.1% of GDP, and provided 11,519 full-time jobs and 6,603 part-time jobs in 2010[23] through 2400+ businesses.

The **demand for travel continues** to increase and the competition for visitors is fierce, particularly with emerging economies that are increasing at a rate 13% per year. This is well above the 4% international annual growth[24], Canada's 1.7% (in 2013)[25], and NL's 3.7% in 2010.[26] For NL to achieve its' *Vision 2020* $1.58 B revenue goal, an annual average growth rate of 5.2% is needed.

> *An over-reliance on the domestic market is a dangerous and less lucrative position for the industry. International visitors are more desirable as they stay longer and spend, on average $1183 more per trip and produce larger profit margins which encourages more investment.*
>
> *Canadian Chamber of Commerce (2013)*

Since 2000, Canada has dropped from 8th in the UNWTO's worldwide visitation ranking to 16th place in 2012.[27] The country's dependence on domestic tourism rose from 65% to 81% of expenditures. This high reliance on domestic is precarious for domestic travellers spend under $300 per trip whereas international visitors spend $1459 per trip.[28] And, there is no guarantee of a stable market. Add to that the propensity for Canadians to travel outside Canada remains strong as evidenced by the travel deficit that ballooned by 736% in the last decade.[29]

This situation is even more dramatic in NL as 86% of all person trips in the province in 2010 were made by residents[30] and it grew to 90% by 2011.[31] In the Eastern Region, the 2011 Exit Survey on non-residents visiting the region confirmed that 41% of the travellers from away were from Ontario making this the strongest Canadian market, followed by 'other Canadians' at 22% and Maritimers at 16%. The USA (9%) and overseas travellers (4%) represent very small markets at present time.[32]

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[22] World Tourism Organization. (2013). *UNWTO Tourism Highlights, 2013 Edition.* (pg. 2.) Purchased from http://mkt.unwto.org/publication/unwto-tourism-highlights-2013-edition

[23] Government of Newfoundland Labrador. (2012). *Tourism Vision Evaluation: Annual Report 2012.* (Pg. 42). Document provided by the NL Department of Tourism, Culture and Recreation.

[24] Deloitte. (2013). *Passport to growth: How international arrivals stimulate Canadian exports.* (pg. 5). Downloaded from: http://media.deloitte.ca/flash/insights/ca_en_insights_tourism_and_trade_111313.pdf

[25] Tourism Industry Association of Canada. (2013). *Gateway to Growth: Canadian Tourism Industry Annual Report. (pg. 7).*Retrieved from *http://tiac.travel/_Library/TIAC_Publications/2013_TIAC_Annual_Report_WEB_FINAL_EN.pdf*

[26] Government of Newfoundland Labrador. (2012). *Tourism Vision Evaluation: Annual Report 2012.* (Pg. 8). Document provided by the NL Department of Tourism, Culture and Recreation.

[27] Tourism Industry Association of Canada. (2013). *Gateway to Growth: Canadian Tourism Industry Annual Report. (pg. 11).* Retrieved from *http://tiac.travel/_Library/TIAC_Publications/2013_TIAC_Annual_Report_WEB_FINAL_EN.pdf*

[28] Canadian Tourism Commission. (2013). *Helping tourism businesses prosper: 2013 - 2017 Corporate Plan Summary.* (pg.4). Retrieved from http://en-corporate.canada.travel/sites/default/files/pdf/Corporate_reports/2013-2017_corporate_plan_summary_-_june_14-13_e.pdf

[29] Canadian Chamber of Commerce. (2013, Jul). *Restoring Canadian tourism: A discussion paper.* (Pg. 5). Retrieved from www.chamber.ca/publications/reports/

[30] Government of Newfoundland and Labrador (2012, January). *Resident Travel Survey Summary Report.* (pg. 1). Document provided by the NL Department of Tourism, Culture and Recreation.

[31] Government of Newfoundland Labrador. (2012). *Tourism Vision Evaluation: Annual Report 2012.* (Pg. 3). Document provided by the NL Department of Tourism, Culture and Recreation.

[32] Government of Newfoundland and Labrador. (2011). *2011 Exit Survey - Profile of Non-residents Visiting the Eastern Regions (Economic Zones 15-16).* (Pg. 3). Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit_Survey_Visitors_to_Eastern_Region.pdf

> *Many Canadian companies choose to do business in the same markets they've operated in for years … Working with familiar clients and markets is a comfortable option, and in the short-term, it may reduce risk … but over the long term, playing it safe can cause companies to loose their edge.*
>
> *Deloitte's Passport to Growth (2013)*

This presents both an opportunity and a need to attract more visitors to Canada. For a high reliance on tourism activities within the province carries long-term risk because there is no guarantee of a stable market, and the average spend is lower.

Ranked as the No. 1 country for overall reputation in the world,[33] the FutureBrand's Country Brand Index also rated Canada as the #2 country brand in 2012, and #1 in 2010 and 2011[34] yet it's not translating into the visitation numbers industry would like. In NL, the $94 million invested in provincial marketing and the *Find Yourself Campaign* has garnered over 183+ awards since 2006 and created strong brand awareness of the province.[35] Yet attracting new visitation remains a challenge for Canada and NL alike. Countries like the USA for example are investing $20M of their $100M Brand USA funding to lure Canadians south of the border. At the same time the Canadian Tourism Commission saw its marketing budget cut by 20% to $58.8M and in 2013 NL saw a 30% reduction to their tourism budget.

Finally, the talent gap continues to be reported as a major challenge facing the tourism industry in Newfoundland[36] and across Canada[37][38]. The demand increases, yet the availability of skilled labour decreases, so the regions of Newfoundland and Labrador will struggle in realizing their full potential.

Coping strategies to avoid the negative impacts from labour realities will include reduced hours, shortened operating seasons, partial room operations for hotels, a potential decrease or inconsistent service quality, and the ability to compete against higher paying fields such as the resource industries. Newfoundland and Labrador is internationally renowned for its people and hospitality and will have to innovate wisely, consider new staffing business models, invest in training immigrants and consider retirees as part of a refocused investment to ensure the lived experience by visitors matches the perception that is in marketplace and perpetuated by the provincial marketing campaigns. Depending on the source (the CTC, TIAC, Canadian Chamber of Commerce, TCR or CTHRC), some of the key challenges facing the tourism industry include:

- Losing global competitiveness
- High cost of travel, air travel in particular and the high hassle factor
- Insufficient investment in marketing, being out spent by many countries
- Attracting investment and investing in new and refreshed product development
- Labour shortages
- Growing travel deficit
- Transportation

Yet despite these challenges, tourism is described as a solid, consistently performing industry that with the right government support, investment, collaborative action and industry engagement, can improve its ranking going forward and reclaim market share.[39]

Travellers will continue to have unprecedented choice in their travel options, and countries will continue to outspend Canada through aggressive marketing and investment plans. A coordinated approach between

[33] Canadian Tourism Commission. (2013, June). Press release. http://en-corporate.canada.travel/content/news_release/reptrak-report-reputation-institute-canada-brand-number-one
[34] Canadian Tourism Commission. (2012). Corporate awards. http://en-corporate.canada.travel/about-ctc/our-awards
[35] CBC News. (2013). http://www.cbc.ca/news/canada/newfoundland-labrador/award-winning-n-l-tourism-campaign-hit-by-4m-cut-1.1300762
[36] Canadian Tourism Human Resource Council. (2012, Mar.). *Attracting and Retaining Tourism Talent: Current Labour Issues and Future Challenges.* A power point presentation for the HNL Board of Directors Meeting March 23, 2012.
[37] Deloitte & Touche LLP. (2008). *Tourism amid Turmoil: How Canadian companies can compete. (*p. 12). A research report prepared for TIAC. Retrieved from http://tiac.travel/_Library/documents/deloitte_tourism_amid_turmoil.pdf
[38] Government of Canada (2012). *Canada's federal tourism strategy: Welcoming the world.* (p. 20). Downloaded from http://www.ic.gc.ca/eic/site/034.nsf/vwapj/Canadas_Federal_Tourism_Strategy-eng.pdf/$file/Canadas_Federal_Tourism_Strategy-eng.pdf
[39] Tourism Industry Association of Canada. (2013, Fall). *Gateway to growth: Tourism competitive benchmarking study.* (p. 11 & 24). Retrieved from http://tiac.travel/_Library/TIAC_Publications/2013_Domestic_Tourism_Benchmarking_WEB_FINAL_EN.pdf

all layers of government and industry will be essential to optimizing the limited resources to increase the volume and yield from visitors to, and within Canada.

To be competitive, the Eastern Region must focus its investments in product and market development in ways that increase the attractiveness for non-resident Canadians and international visitors, while maintaining a position of strength for Newfoundlanders and Labradoreans.

Canada must develop niche products and services tailor-made to match the unique characteristics of its diverse regions.

Deloitte's Destination Canada: Are We Doing Enough (2007)

4.2 Data Insights

Assessing the Eastern Region's Appeal

There are five dimensions to the TDVAA, with multiple sub-sets and indicators. Primary and secondary data is gathered to inform each dimension. Table 3 presents a high-level summary of the appraisal based on an analysis of all data inputs, project team review and stakeholder validation. The end result is a decision if:

> **YES** – An affirmation can be made to support a positive state for the destination.
>
> **ALMOST** – There is evidence of good investments and progress, but targeted development would enhance the destination.
>
> **NO** – Evidence indicates this is the weakest area for the destination and requires the most attention to improve the competitiveness and appeal of the destination.

It's important to note that the categorization is not absolute; rather it is based on a review of the data, discussion with the EDMO and a conclusion reached. Each dimension first presents the summary statement, this is followed by data tables, key findings about the facts, and finally the implications and considerations. Together this information is aggregated resulting in the key findings and recommendations in Chapter 3.

For example:

The destination has a depth of demographic information about visitors. [YES]

The destination has destination specific and/or municipal websites that provide essential information to visitors. [NO]

The second element of each dimension, often in table format, provides the data that formed the basis of the EDMO discussion followed by *"Key Findings"* related to the table and/or statement. Finally the "*Implications and Observations*" are the interpretation of the information made by the consultants. It is the net sum of this information that informed Chapter 3.

To provide a quick, high-level overview, Table 3 provides the summary of this part of the assessment process for the Eastern Region.

Table 3 High Level Summary of the Key Appraisal Dimensions

1. Reports, Plans and Studies Dimension			Yes	Almost	No
Existing Info	Existing information	EI1. Depth of reports, plans, studies	X		
	Projects in the pipeline	EI1. Tourism demand generating PIP's	X		

2. Visitor Dimensions			Yes	Almost	No
Visitor Profile	Demographic research	VP1. Depth of demographic info on visitors		X	
	Psychographic research	VP2 Depth of psychographic info on visitors		X	
	Satisfaction & exist surveys	VP3 Produces satisfaction & exit surveys	X		
Customer Engagement	Website and social media links	CE1 Municipal websites with essential info			X
		CE2 Tourism Operators with essential info	X		
	Trip Advisor	CE3 Municipalities with TripAdvisor accounts			X
		CE4 Tourism Operators with TripAdvisor accounts			X
	Facebook	CE5 Municipalities with Facebook Accounts	X		
		CE6 Tourism Operators with Facebook Accounts			X

3. Product and Market Dimensions				Yes	Almost	No
Assets & Attributes	Infrastructure Based Companies					
	Transportation	IB1.1	Variety of ground transportation options			X
		IB1.2	Travel options to and within the region		X	
		IB1.3	Reliable, frequent visitor signage	X		
		IB1.4	Variety of water-based amenities for travellers by watercraft			X
	Visitor Information Centres	IB2	Variety of visitor services		X	
	Accommodations	IB3.1	Variety of quality levels & price points	X		
		IB3.2	Has branded or 'flag' properties			X
	Culture - Heritage Based	IB4	Culture& heritage assets at varying price points	X		
	Nature Based	IB5	Nature based assets at varying price points	X		
	Trails and Routes	IB6.1	Driving routes through the region	X		
		IB6.2	Activity based trails (hiking, snowmobile, ATV)	X		
		IB6.3	Variety of walking trails	X		
	Man Made Attractions	IB.7	Man-made attractions at a variety of price points		X	
	Shopping/Retail	IB.8	Shopping and retail at a variety of price points	X		
	Culinary, Food and Beverage	IB9.1	Restaurants with variety of options & price points		X	
		IB9.2	Responds to F & B needs of various travellers			X
		IB9.3	Offers culinary themed establishments that purposefully attract visitors.		X	
	Conference, Convention, Trade Show	IB10	Offers conference, convention, and trade show space to serve as a primary draw for markets			X
	Activity Based Companies					
	Activity-Based Tourism Assets	AB1	Offers a range of activities to engage visitors	X		
		AB2	Flexibility/choice for length, interaction, price point	X		
		AB3	Tour operators that package & sell domestically	X		
		AB4	Tour operators that package & sell internationally	X		
	People/Program Based Companies					
	Program-Based Tourism Assets	PB1	Has a range of experiential program providers	X		
		PB2	Hosts a number of festivals & special events	X		
		PB3	Festivals & special events offered regularly	X		
	Demand Generators					
	Demand Generators/ Visitation Motivators	DG1	Primary demand generators	X		
		DG2	Secondary demand generators	X		

4. ***Sustainability: Growing Tourism into the Future Dimensions***				Yes	Almost	No
Resource Base	Human Resources	HR1	Sufficient labour pool for current/future visitation			X
		HR2	Region promoting tourism as a viable career option			X
		HR3	Evidence of strategies addressing labour constraints	X		
		HR4	Evidence of training and business development in last 5 years	X		
		HR5	Evidence of tourism business success planning		X	
	Sales & Marketing	SM1	Tourism businesses selling through multiple channels	X		
		SM2	Individual operator sales extended through regional or provincial online booking engines			X
		SM3	Region contributes to province with iconic and primary demand generators	X		
		SM4	Regions participates in activities to drive business to operators	X		
		SM5	Region has tour operators selling domestically	X		
		SM6	Region has tour operators selling internationally	X		
		SM7	Market demand for range of tourism offers	X		
	Environmental & Social Practices	ESP1	Evidence of environmentally responsible practices relative to tourism.		X	
		ESP2	Human use impact monitoring			X
		ESP3	Environmental impact monitoring			X
		ESP4	Community engagement in events that attract visitors	X		
	Strategic Planning & Investment	SPI1	Tourism is an objective in long-term plans/documents		X	
		SPI2	Current strategy to guide investment & product development		X	
		SPI3	Current marketing plan to guide investment & promotional activities	X		
		SPI4	In past 5-years, capital has been invested in infrastructure renewal/expansion	X		
		SPI5	In past 5-years, capital has been invested in product & experience development	X		
		SPI6	The majority of tourism businesses can survive without government funding		X	

5. ***Measures of Success Dimensions***				Yes	Almost	No
Key Performance Indicators	Measures of Success	KPI1	Commercial accommodations on par or above provincial average			**X**
		KPI2	Offers year-round tourism opportunities		X	
		KPI3	Commercial occupancy spread through the year			X

4.2.1 Reports, Plans, and Studies Dimension

1. Reports, Plans and Studies Dimension: Existing information available to industry, plus projects in the pipeline at the discussion stage or submitted for approval or funding.		
Consolidate Existing Information	EI1. Existing information E12. Projects in the pipeline	Identifies the documents, plans, studies, and projects that impact tourism (secondary data).
Data Collectors	TCR, HNL and EDMO with support from IBRD/ACOA and others	

EI1 The destination has a depth of reports, plans and studies. [YES]

EI2 The destination has projects in the pipeline that will increase demand for tourism. [YES]

This study was informed by The Department of Tourism, Culture and Recreation's (TCR) Tourism Destination Management System and the Restaurant Association of Newfoundland and Labrador's E-Dining databases plus a significant number of reports, plans and studies provided by TCR, HNL, the EDMO, IBRD, ACOA, industry stakeholders and the contractor. In total, 118 documents were reviewed (See Appendix 3):

- 5 International
- 26 National and Atlantic
- 49 Provincial
- 10 Regional DMO
- 15 Community/Business

The scope of these documents included:

- Strategic planning documents
- Tourism research such as exit studies, performance metrics, tourism indicators, operating statistics, visitor statistics, air capacity, hotel occupancy, and rate insights
- Customer and market profiles (resident, non-resident, national)
- Labour market information
- Activity profiles (e.g. Hiking, skiing, snowmobiling, fishing)
- Resource inventories
- Tourism guides
- Trends

There were ***28 projects in the pipeline*** (PIP) (Appendix 4) in progress with or without specific documentation (as identified by ACOA, IBRD). Of these, 12 were identified as being relevant within the scope of this study relative to driving demand for tourism. The definition used for a Project in the Pipeline was:

> "*A major project that is in the concept or development stage, application for funding stage, or approval stage within the past five years (2008-2013).*

Projects may be supported with specific documentation, however, those projects in the concept phase may not yet have documents to support the initiative. In most cases IBRD and ACOA staff identified these projects as they have the on-the-ground connections. Only projects that may have a direct impact on generating tourism demand are presented in Table 3, community, recreational or economic development projects have not been listed, however a complete listing of all provided can be found in the Appendix 3.

Table 4: Projects in the Pipeline Offering The Greatest Tourism Potential

Placentia West – Museum, Craft Store Expansion: Demonstration area to allow artists to explain their craft and allow guests to try their hand at the craft. This is tied to the Economusee.	**Artisan Trail – Cultural Craft Development, Bonavista Peninsula**: Enhance visitor experience at craft shops and galleries.	**Lawn Islands Archipelago Ecological Reserve, Burin Peninsula**: Install interpretive panels, enhancement of the walking/hiking trail, the construction of rest areas, benches and picnic tables.
Fortune Head Interpretation Centre: Development of the site to improve and enhance the visitor experience.	**Coaker Waterfront Development, Port Union:** This has a connection to the GEO Park as fossils are viewable on the waterfront. **Tourism Housing, Port Union:** Restore the Coaker row houses for tourism staff accommodation.	**Walking/Hiking Trail Assessment/Development:** Chambers Cove Trail, Little Catalina to Maberly, Burin Peninsula Trailway, Hike Discovery, Burin Peninsula ATV Trail.
Fishing Heritage, Bonavista Peninsula: 500 Years of Fishing Heritage.	**Heritage Square Enhancements, Town of Burin:** Enhancement to the historic downtown square.	**Discovery GeoPark Inc. Bonavista Peninsula**: Geological sites, interpretation programming, research, site assessment.
Romantic Destinations; Hearts Delight, Heart's Content, Hearts Desire, Cupids: Opportunity to leverage the charm of these destinations under a romance theme, for example romantic getaways, and wedding location development.	**Creative Stages, Joe's Place, Cape Random:** Building used for filming of a feature film, attempting to keep the set and transform to useable visitor space.	**Grand Bank Theatre, Burin Peninsula:** Structural and equipment-related enhancements in order to present competitive and appealing performances.

Key Findings

- There is a profound amount of information available for the Eastern Region to provide insight into tourism in the Eastern Region. The challenge is accessing, consolidating, and reviewing this dearth of information in a timely manner to inform decision-making;
- Many projects in the pipeline were submitted, however, less than half were determined, based on the information available, that they would contribute to driving new tourism demand. Others were enhancements or more community recreation based projects;
- Of the 12 projects in the area at various stages of development, some have already received funding, some are waiting for further consideration and some are still on the drawing board; and
- Representatives from ACOA, IBRD and the Province have knowledge of these projects; and therefore are in a good position to offer sufficient context related to their potential future development. This context helped inform their selection for further consideration.

Implications/Considerations

- There should be minimal investment in generating additional reports, rather future projects and plans should draw on the existing information to the degree possible; and
- The Advisory Committee, IBRD, ACOA, EDMO and the Province in consultation with the proponents reach consensus around the true potential of the core projects in the pipeline and prioritize the list in terms of greatest ROE (return on emotion) and ROI (return on investment for the operator and regional economic impact). Once this is accomplished, the list must be prioritized and steps for implantation identified.

4.2.2 Visitor Dimension

2. Visitor Dimensions: A tourism destination with a high appraisal can demonstrate their investment in understanding the traveller.			
The Visitor Profile	VP1 Demographic research VP2 Psychographic research VP3 Satisfaction & exist surveys	Identifies the research available to inform decision-making based on an understanding of the traveller.	Data Collectors: TCR, HNL, EDMO
Customer Online Engagement	CE1 Operator websites CE2 TripAdvisor CE3 Facebook	Assesses if the destination, cities and businesses have a TripAdvisor and/or Facebook account and the degree of responsiveness to traveller posts.	Data Collectors: Data collection team (DCT)

VP1 The destination has a depth of demographic information about visitors. [ALMOST]

VP2 The destination has psychographic research on traveller motivations but DOES NOT have research on attitudes and values. [ALMOST]

VP3 The destination produces satisfaction and exit surveys to gather insights on visitors' travel experiences. [YES]

The province gathers a wide range of ***demographic information*** on a number of variables such as visitation numbers, roofed accommodations, camping, airport passenger movement, room night sales, non-resident demographics per-party spend, etc. This information provides the provincial context but also can be segmented for Eastern Region.

There is little ***psychographic information*** available for travellers specific to the Eastern Region. While there is a great deal of insight about travellers to the province no specific information was available for the destination. TCR is in the process of completing a Non-Resident Travel Motivations Study that will add new insights for the province. The challenge however is getting a more robust understanding of the resident traveller (90% of visitation in 2012) and their regional movement, activities, and motivations for travel. Currently, there is much more information on the 10% of non-resident travellers. Understanding the travel attitudes and motivations of visitors between Eastern and the other four regions of NL could be valuable to all regional DMOs.

Exit surveys and key reports are published on a regular schedule; the frequency however has been impacted by budget cutbacks.

- TCR published research on information about visitor satisfaction levels can be found in several reports
- 2011 Exit Survey - Profile of Non-residents Visiting the Eastern Region (Economic Zones 15-16)
- 2011 Exit Survey - Profile of Non-residents Visiting the Avalon Region (Economic Zones 17-20, excluding St. John's)
- 2010 Resident Travel Survey
- Tourism Vision Annual Report, 2012

KEY FINDINGS

- There is a much higher volume of research information on the non-resident traveller, which represents 10% of the current visitation base, and very little comparative information on the resident traveller that could aid the Eastern region in understanding the visitor dynamics of 90% of their market from NL;
- There is a range of high quality research reports available, however, to create a visitor profile that businesses could use to inform product/experience development, market development and targeted promotional investments requires a great deal of work on the part of the EDMO or operator. As a result, it is difficult to answer the question "Who are the ideal guests to the Eastern Region?" that would allow a targeted focus on collaborating to attract visitors with a common profile;
- There is no evidence that the Eastern region has drawn on the free national level Canadian Tourism Commission (CTC) Explorer Quotient TM (EQ) research that provides demographic and psychographic visitor profiles for the tourism industry. This may be in part due to the fact the Province does not have a license to access the in-depth information available to the Canadian tourism industry;
- When the visitation numbers vs. spend per traveller are compared (Table 5), it is evident that the non-resident traveller is important and the trending towards increased non-resident travel should be addressed;

Table 5 2011 Resident and Non-Resident Visitation and Spending in NL

2011 Figures	Resident Travel	Non-Resident Travel	Total
Person Trips	4,072,000	459,100	4,531,100
Percent of Visitation	90%	10%	
Spend	$575.1 M	$424.6 M	1.004B
Percent of Tourism Spending	58%	42%	
Per Person Yield	$141.23	$923.55	

Source: Tourism Vision Evaluation Annual Report 2012[40], p. 3 with updated figures from TCR June 2014.

- Appreciably there are challenges to NL's tourism industry, such as ferry costs and times for travel, airlift capacity and the price of a ticket, yet despite this, air passenger movement increased from 1.78M in 2009 to 2.06M in 2011, and the contribution to provincial GDP increased from 0.9% in 2007 to 1.1% in 2010, demonstrating a positive return on investment.[41]
- In terms of popularity, the Eastern Region ranks fourth as a region with Western the most popular at 52%, followed by Central at 46% and 38% St. Johns. The Eastern region attracts 24% of the resident travellers, just ahead of the Avalon region, which is separated out and garnered 13% of

40 Note: "Due to the new methodology, non-resident visitor and spending estimates for 2011 and onward are not directly comparable to estimates in previous years which were based on 2003/2004 Exit Survey results.

41 Government of Newfoundland and Labrador (2012). Tourism Vision Evaluation, Annual Report 2012. P. 37.

visitation with Labrador capturing a smaller 7%;[42] Note, these percentages only apply to resident travellers and are not general to all visitation.

- A real limitation of resident travel for accommodators is that 42% of rural residents stay with family or friends, only 39% opt for a hotel, while the remaining 19% select a cottage, campground, B&B or cabin. Comparatively 31% of St. John's CMA stay with family or friends, 22% opt for a hotel, while the remaining 43% select a cottage, campground, B&B or cabin.[43]

Implications/Considerations

- The EDMO should review the free EQ information, in consideration of the visitor information provided in the exit surveys to gain insight in the types of travellers to Canada; and
- TCR should consider securing an EQ license from the CTC and leverage the knowledge available on Canadian travellers and Canada's key international markets to provide quick access of consolidated information of value in designing, developing and marketing travel to specific traveller types for Eastern region. This could be of value in attracting non-resident travellers;[44] and
- TCR should consider investing in resident profiles given that it represents 90% of the travellers; this could help operators and provide regional understanding.

Customer Engagement

Appreciably, the number of places where tourism destinations, municipalities and businesses can provide information to travellers and create online engagement is endless. To examine if there is a basic level of online customer engagement with travellers, this study looked at:

- Municipal and operator websites
- tripadvisor
- LIKE US ON facebook

This was a high level look to see:

- If the traveller can find the business or municipality;
- How the business or municipality is presented online; and
- Level of engagement and conversation between the business and the traveller.

CE1 The destination has destination specific and/or municipal websites that provide essential information. [NO]

CE2 The majority of tourism businesses have websites that provide essential information to visitors. [YES].

CE3 The municipalities have TripAdvisor Accounts. [NO]

CE4 Tourism operators have TripAdvisor accounts. [NO]

CE5 The municipalities have Facebook Accounts. [YES]

[42] Government of Newfoundland & Labrador. (2012, January). *Resident travel survey summary report - 2010.* A study conducted by MarketQuest Omnifacts Research. pg. 23 & 24.

[43] Ibid. pg. 29

[44] Ontario has a segmentation study identifying 12, 7-page visitor profiles for operators and regional DMOs to work with, the CTC EQ profiles for non-licensed jurisdictions are 2-pages in length, for licensees they are 26 pages in length and rich in demographic, geography, attitudes, values and motivation research.

CE6 Tourism operators have Facebook Accounts. [NO]

Table 6: Municipal Website Summary

	Number	% of total
Total number of towns/cities in the region	96	
Number of websites in region	39	41%
Number of towns/cities with consumer websites promoting the region	8	8%
Number of towns/cities with municipal websites with a basic tourism section	31	32%
Have visitor testimonials posted on their website	10	10%
Post photos of visitors engaged in the activity/experience	28	29%
Post photos of the location or infrastructure	35	36%
Post tourism related videos of visitors engaged in the experience	2	2%
Post videos of the location or infrastructure	2	2%
Have a tourism booking call to action on websites	32	33%
Have ‘how to get here’ visitor information on website	28	29%
Accept phone/email reservations for tourism booking	35	36%
Accept online reservations for tourism bookings	0	0%
Sign up for a tourism e-newsletter sign up option	4	4%
Have a contact page for the travel trade	0	0%
Have a destination/city/town tourism blog	1	1%
Have a link referring guests to their TripAdvisor Account	0	0%

Table 7: Tourism Operators' Website Summary

Type	Number of Assets	Percentage With websites	Percentage with Trip Advisor	Percentage with Facebook
Total Assets	611	67%	31%	31%
RV & Campgrounds	32	78%	6%	44%
Roofed Accommodations	209	76%	55%	39%
Culture and Heritage Based Assets	122	61%	18%	17%
Nature Based Assets	45	53%	13%	7%
Trails and Routes	54	65%	41%	35%
Man-Made Attractions	14	93%	29%	43%
Activity Based Assets	36	72%	39%	56%

Program Based Assets	14	0%	0%	7%
Festivals and Events	85	61%	4%	26%

Table 8: Tourism Operator's Select Website Information

Website Information																
Sector	**Number of Assets**	**Website (1/0)**	**Visitor Testimonials**	**Photos of visitors engaged**	**Photos of location/infrastructure**	**Post photos of visitors engaged in experiences**	**Post videos of the location or infrastructure**	**Call to action on the home page**	**How to get here info/maps/ etc.**	**Email or phone reservations**	**Online reservations**	**Accept credit card payment**	**Newsletter**	**Contact page for travel trade**	**Have a company blog**	**Have a link to their Trip Advisor Account**
RV & Campgrounds	32	25	4	16	22	16	0	9	19	24	2	24	0	0	0	0
Roofed Accommodations	209	158	62	50	156	42	12	59	131	156	26	169	10	11	13	25
Culture and Heritage Based Assets	122	75	10	25	63	25	2	13	48	51	1	28	10	8	0	1
Nature Based Assets	45	24	0	9	16	9	0	12	23	20	0	11	1	7	0	1
Trails and Routes	54	35	19	27	34	27	3	4	34	32	1	4	22	3	0	1
Man-Made Attractions	14	13	1	9	10	9	1	4	8	10	1	10	4	1	0	0
Activity Based Assets	36	26	11	22	28	15	13	18	18	29	5	17	15	26	2	3
Program Based Assets	14	0	0	0	13	2	1	7	1	0	0	3	12	0	3	1
Festivals and Events	85	52	2	18	28	19	3	13	25	21	3	15	2	44	1	1
Totals	611	408	109	176	370	164	35	139	307	343	39	281	76	100	19	33
Percentage		67%	27%	43%	91%	40%	9%	34%	75%	84%	10%	69%	19%	25%	5%	8%

Table 9: Municipal TripAdvisor and Facebook Accounts

Of those with TripAdvisor Accounts	**Number**	**% of Total**
Number with TripAdvisor Accounts	13	14%
Average number of hotels/accommodations listed	5	
Average number of restaurants listed	7	
Average number of attractions listed	1.5	
Of those with Facebook Accounts		
Number with Facebook accounts	80	83%
Average of the # of Likes	198	
Average # of people talking	5	
Average # visitors who wish they were here	1,381	
Have a link referring guests to their Twitter Account	0	
Have a link referring them to Google map (or other mapping option)	55	69%
Have a link referring guests to their YouTube account	0	0
Have direct links to companies sales pages	16	20%
Have a booking engine for businesses	0	0%
Accept credit card payments	0	0%

Table 10: Tourism Operator's Trip Advisor Presence

Trip Advisor										
Sector	Number of Businesses	Account (1/0)	Number of reviews	Number of visitor photos	Professional Photos (1/0)	Rating out of 5	Zero comments	# Comments in top 10 reviews	Responds <50 of the time (1-5 out of 10)	Have a link referring guests to their Facebook page
RV & Campgrounds	32	2	18	22	0	3.5	10	1.50	50	0
Roofed Accommodations	209	115	2577	1265	15	4	1857	0.5	64	1
Culture and Heritage Based Assets	122	22	199	62	1	3.48	107	0.36		0
Nature Based Assets	45	6	32	36	0	4.67	29	1.33	29	0
Trails and Routes	54	22	1588	889	0	4.92	53	0	53	0
Man-Made Attractions	14	4	41	14	0	3.87	9	0.42	12	0
Activity Based Assets	36	14	478	278	4	5	14	0	0	0
Program Based Assets	14	2	0	3	84	38	0	14	0	0
Festivals and Events	85	3	72	40	2	4.5	2	0.6	1	0
Total Number	611	188	5007	2606	25	117.9	2119	4.71	110.1	1
Percentages		31%								1%

Table 11: Tourism Operator's Facebook Presence

Facebook													
Sector	Number of Businesses	Facebook (y/n)	Number of Likes	# of people talking	Visitors were here	# Posts in last 14 days	Link to their Trip Advisor Account	Link to Google map	Link to Events	Link to Special offers	Post photos	Post videos	Offer some type of engaging contest
RV & Campgrounds	32	14	4458	48	379	23	0	4	0	0	12	0	0
Roofed Accommodations	209	81	24258	680	2196	103	5	22	13	1	79	8	0
Culture and Heritage Based Assets	122	21	14239	1056	4387	163	2	8	12	0	20	3	2
Nature Based Assets	45	3	1523	49	7	6	0	1	1	0	3	0	0
Trails and Routes	54	19	15360	63	1039	5	0	2	19	1	19	0	0
Man-Made Attractions	14	6	6497	42	929	11	0	1	2	0	6	0	1
Activity Based Assets	36	20	9309	455	2826	58	4	8	5	0	21	9	0
Program Based Assets	14	1	3	2	7	1920	76	14	16	0	0	2	1
Festivals and Events	85	22	15750	616	456	49	1	3	12	10	19	4	1
Total number	611	187	91397	3011	12226	2338	88	63	80	12	179	26	5
Percentages		31%					47%	34%	43%	6%	96%	14%	3%

Key Findings

- Tourism businesses are not leveraging readily available and low / no cost online tools in order to grow their business. This translates into making visitors work hard to find the information they are looking for and will without doubt, impact their decisions to travel to the Eastern Region and, or to tourism businesses in the region;
- For those businesses that are using online tools like TripAdvisor and Facebook most are missing the opportunity to have conversations with their guests (i.e. by responding to comments and complaints), which in turn has the potential to negatively influence the actions and behaviours of future potential guests;
- 62% of tourism businesses within the Eastern Region have a web site however 38% of tourism

businesses could not easily be found online;

- 41% of the 96 municipalities in the region have a website; and have a tourism landing page that attempts to provide helpful information;
- 8% of municipalities that have websites go beyond providing basic visitor information to attract visitors to their community, these include[45]: Bay Roberts, Bonavista, Brigus, Burin, Carbonear, Clarenville, Elliston, Ferryland, Fortune, Grand Bank, Harbour Grace, Holyrood, Marystown;
- Only 14% have a clear call to action to make a booking, reservation or close the sale in a quick, timely fashion;
- Roofed accommodations, trails and activity based businesses have the strongest presence on TripAdvisor;
- Engagement and creating conversations with guests by responding to posts varies widely, but overall, most operators are not actively conversing with their guests on TripAdvisor which limits their ability to personalize their comments and relationship with their guests;
- 83% of the 96 municipalities have a Facebook account whereas only 31% of tourism businesses do. Yet, of those municipalities that have a Facebook account few are active; they are not using the tool as a proactive communication vehicle, their pages are placeholders only;
- 31% of tourism businesses have a TripAdvisor account, 69% are not despite it being the number one trusted source for travel information;
- This is a lost opportunity on TripAdvisor and Facebook to communicate in spaces where travellers are seeking information. To incorporate this requires the skill to set up the account, and the commitment to remain 'in the conversation' and respond to both positive and negative comments – just as the business would do in person;
- There is strong tourism infrastructure imagery on websites however most are weak on including visitors engaged in the experience they are selling and few use video on their websites, Facebook and TripAdvisor profiles;
- Operators are very weak in creating the digital connections between multiple social media platforms which could quickly and easily be corrected through hyperlinks and connecting their website, Facebook site, TripAdvisor profiles and any others they may use (YouTube, Pinterest, etc.); and
- Few communities are engaging visitors in conversations about their experience even though guests are posting comments about their visits;

IMPLICATIONS/CONSIDERATIONS

- The provincial tourism website (www.newfoundlandandlabrador.com) is the primary source for providing relevant and helpful visitor information to potential visitors about travel to and within Newfoundland and Labrador and should remain as robust as possible as the primary source of information for travellers;
- Municipalities that have tourism assets and an interest in leveraging tourism as an economic driver that do not have a website should ensure their presence on the provincial tourism website is accurate. They should encourage tourism operators within their community to maintain up-to-date information for TDMS;
- Municipalities that have a website could enhance their tourism landing pages by providing relevant local area information about their community, and ensure links to the provincial website and their major tourism businesses are available. This is especially valuable if visitors begin their travel search with a specific community they'd like to visit, rather than trying to locate it on the provincial tourism website;
- For municipalities without a website, but are using Facebook as a means to connect with current and potential visitors, a link to the provincial tourism website should be included and they should remain active in responding to visitors and providing regular updates;
- There is an opportunity for all businesses to enhance their online presence by adding images and video that show guests enjoying the offered experiences;
- There is an opportunity for all tourism businesses to leverage the power of TripAdvisor and Facebook, and ensure other social media sites are connected;
- Online tourism marketing training for tourism operators is required, however taking the training is not enough – operators must commit to change and act within a set time frame post-workshop to be

45 Note some municipalities have a Facebook or TripAdvisor account, rather than a landing page on their website.

eligible for the funding support or sponsorship to attend;

- Before any further training is offered the EDMO must clearly understand the barriers that are preventing operators from taking and or implementing specific training and determine if there are more effective ways to equip tourism operators; and
- Ensure the online training focuses on the basics first – ensuring operators have a web-presence that reflects what they can afford to invest and maintain and that they know how to link to other online platforms, use widgets, and know how to drive the conversation with visitors and the sale.

4.2.3 Product-Market Dimension

3. Product and Market Dimensions: Determines the depth and breadth of tourism products, services and experiences available at various price points for different markets.			
Assets & Attributes	Infrastructure Activity-Based Tourism Businesses Program based Tourism Businesses Demand Generators / Visitation Motivators	Identifies the core tourism assets and demand generators that contribute to a positive visitor experience and motivate travellers to visit.	Data Collectors: Data collection team

Infrastructure-Based Business (IB)

The infrastructure portion of the review examined seven important dimensions whereby significant resources are required to create, maintain and/or restore the physical assets. This includes businesses that have a high infrastructure cost (e.g. accommodations, attractions, transportation). Revenue generated from tourism or servicing the traveller may be their primary business (e.g. accommodations, attractions), or it may be a community asset for which tourism receipts is an important revenue stream (e.g. Performing arts venues).

Transportation

IB1: The destination offers variety for ground transportation services to accommodate visitors that arrive by air and don't have their own personal transportation options. [NO]

IB2: The destination offers a variety of transportation options for travel to and within the region. [ALMOST]

IB3: There are reliable and frequent visitor friendly signage and way finding along popular tourist routes. [YES]

IB4: The destination offers a variety of water-based amenities to accommodate visitors travelling by watercraft. [NO]

Table 12: International Arrivals & Returning Residents at Fortune NG, St. Pierre & Miquelon

International Arrivals and Returning Residents at Fortune NF, St. Pierre and Miquelon					
2013	May	June	July	August	Total*
Newfoundland & Labrador	860	543	621	800	2824
Other Canada	36	186	1114	1142	2478
USA Residents	13	42	117	99	271
SPM Residents	407	357	817	1195	2776
Other	5	26	42	55	128
Total	1321	1154	2711	3291	8477

Source: Canadian Customs and Excise
*Includes arrivals from balance of the year, which are minimal related to May – August.

Table 13: Le Capestran Ferry Schedule

Le Capestan Ferry Schedule: July / August 2014		
Day of Week	**Depart St. Pierre**	**Depart Fortune**
Wednesday	08:15	09:15
Wednesday	16:00	17:00

KEY FINDINGS

- Eight airlines service Newfoundland and Labrador; the nearest airport to the Eastern Region is in St. John's; there is not a commercial airport within the region;
- There are limited transportation options available for visitors to travel and visit the numerous destinations and tourism sites found throughout the region if they do not have their own vehicle;
- For those who arrive by air and require transportation, rental vehicles are available; in peak travel times pre-booking vehicle rental may be required;
- There is no scheduled public transportation offered for travel to and within the region;
- Taxi operators within some communities do provide an affordable transportation option, for travel in and to various communities but this is not widely known or promoted to visitors (non-islanders) when planning their trip;
- There is visitor friendly signage and way finding along popular tourist routes;
- Signed touring routes are present; Irish Loop, Baccalieu Trail etc., some signage needs upgrading and secondary signage off the touring routes do require attention;
- As the destination is surrounded by water, there are limited services available to visitors who may like to travel to the region by watercraft;
- The ferry service in the region is acceptable, except in situations where a ferry breaks down. In certain circumstances, this forces Marine Atlantic Inc. to move ferry equipment to locations where it is needed, potentially eliminating ferry service from tourism routes;
- Opportunities to better leverage Saint Pierre and Miquelon tourism traffic on the Burin Peninsula are hampered as the Le Capestan ferry service schedule makes it difficult for guests to take time to visit Fortune for example while on route; and
- Saint Pierre and Miquelon visitors choose or are forced to stay overnight on the island (except on Wednesdays in the summer when a daily AM and PM return service is offered) and therefore, they have limited time to take in the tourism sites located on the Burin Peninsula.

Implications/Considerations

- While the transportation options for resident travel is adequate, it is not ideal for non-resident travellers or resident travellers without a vehicle. This limits the opportunity to attract visitors who prefer coach or van transportation or are unable to secure a rental vehicle in high season;
- There may be a business opportunity for an operator(s) to offer scheduled transportation services to various destinations throughout the region during peak travel seasons, from St. John's for example;
- Taxi operators throughout the region are encouraged to formalize the multi-community transportation services they offer and partner with the EDMO and other tourism organizations to ensure this information can be made available to visitors who choose not to rent a vehicle;
- Private and public sector tourism entities located throughout the region are encouraged to leverage existing signing programmes such as TODS for their specific area and implement upgrades and enhancements where necessary in order to better serve the travelling public; if guests cannot easily find you they will not visit;
- While the opportunities to influence the Le Cabestan ferry schedule are limited, the EDMO and operators and tourism officials on the Burin Peninsula are encouraged to implement creative strategies to attract a portion of the guests traveling to and from St. Pierre and Miquelon during peak travel months May to August when passenger levels reach 8477. Initial focus should be to capitalize on guests who are travelling on Wednesdays during July and August; this is the only day when daily return service is offered providing guests an opportunity to experience Fortune and the surrounding area during the mid-day;
- Consideration should be given to promoting the basic visitor services available at any number of public docking locations throughout the region and, where necessary, enhance this offer to make these locations more appealing for guests arriving or travelling around by personal watercraft; and
- Tourism leaders within the region are encouraged to continue on-going dialogue with Marine Atlantic Inc. officials in order to avoid interruptions to ferry service due to equipment issues.

Visitor Information Services

IB2. The destination offers a variety of visitor information services to accommodate visitors travelling to and throughout the region. [ALMOST]

Table 14: Provincial/Regional VICs

Provincial / Regional Visitor Information Centres (VICs)	Number	% of total
Total number of destinations in the region	96	
Number of destinations with VICs	17	18%
Number with public washrooms	17	100%
Number with free internet access or Wi-Fi	4	23%
Number with password internet access or Wi-Fi	7	41%
Number that operate year round	2	12%
Number that operate 6 months of the year	5	29%
Number that operate high season only (Jun – Sep)	10	59%
Total number of VIC staff	100	
Average number of staff per VIC	6	
Visitor Services / Activities Available	Number	

Provincial / Regional Visitor Information Centres (VICs)	Number	% of total
Provide print information	17	
Gift shop/retail	5	
Video viewing area	11	
Picnic area or place to sit and eat	14	
Able to purchase food	4	
Museum or displays/artefacts available	13	
Guest computer available for visitor use	7	
Place to plug in and charge electronics	17	
Staff regularly Tweet about destination	14	
Staff regularly update regional/VIC Facebook account	15	
Able to make bookings/reservations for traveller	15	

KEY FINDINGS

- There are 17 VICs providing levels of service and amenities that may not meet the needs of all travellers;
- Only 2 VICs are open year-round, 10 operate May to October, 5 operate June to September;
- 15 VICs have a Facebook account that is updated regularly by VIC staff;
- It was reported during industry consultations that washrooms in VICs are not well maintained;
- There are areas and communities that are not providing visitor information services;
- Funding cuts from a variety of government sources have impacted the total number of VICs in the region and many VICs have been forced to close in recent years, industry stakeholders are upset with this reality;
- VICs provide a valuable service to visitors; however, funding cutbacks have reduced the delivery of visitor services. It was reported that grant approvals to hire seasonal staff come late and therefore, tourism leaders are unsure of the services they will offer from year to year;
- Provincial VICs are staffed by paid staff while regional VICs are staffed by a combination of paid staff and volunteer staff or exclusively by volunteers;
- It was reported that some VICs have a challenge finding knowledgeable VIC staff who are aware of the tourism assets available in the area; and
- During the industry consultation sessions it was evident that tourism operator's associate having a VIC in their community with the traffic they see at their business.

IMPLICATIONS/CONSIDERATIONS

- Evaluating the needs of today's traveller, relative to visitor information and services at the 17 VICs should be explored to ensure the traditional face-to-face needs are being met and that the digital connections and conversations that could be taking place are enhanced;
- VIC staff should receive training that helps them understand the role they could play in adding value to the traveller's journey; making a shift from merely providing a service (e.g. handing out brochures) to understanding type of travel experience they are seeking, then being in a stronger position to recommend opportunities more specifically aligned to their desires and having a direct impact on visitor spending levels; and
- The evaluation should identify and prioritize required enhancements and changes to the delivery of visitors services in these locations and steps be taken to address any deficiencies (e.g. washroom maintenance, free Wi-Fi) or additions that would enhance the visitor experience (e.g. picnic tables, places to charge electronic devices).

Accommodation Base

IB3.1 The destination offers rooms at a variety of quality levels and price points. [YES]

IB3.2 This inventory includes representation by "branded or flag" properties (widely known and respected) properties. [NO]

Table 15: Accommodation Statistics

Category	# Of Properties	# Of rooms/sites	Price Range	% Year round
Hotel/Motel	31	758	$60 to $380	81%
B&B	71	298	$26 to $325	46%
Inn	7	72	$85 to $429	57
Cottages, Vacation Homes, Hostels	100	454	$60 to $695	61
RV Parks and Campgrounds	32	1,548 transient sites	$15 to $55	3% (1 property)
Totals	241	1,582 roofed 2,427 sites		

Key Findings

- There are 209 roofed accommodation properties and 32 RV Parks/Campgrounds with a total of 1,582 rooms and 2,427 RV/camp sites within the region;
- The majority of roofed accommodation properties are small with an average of 4 to 5 rooms per property, the largest properties are:
  - Marystown Hotel/Convention Centre: 133 rooms
  - St. Jude Hotel: 63 rooms
  - Terra Nova Resort and Golf Community: 87 rooms
  - Clarenville Inn: 63 rooms
- There is an adequate level of accommodation options available throughout the region providing visitors with variety in choice, price point and seasonal availability;
- Compared to annual provincial occupancy, there is lower accommodation capacity in the Eastern Region (excludes St. John's: Provincial Occupancy: 40.6%, Eastern 35.8%;
- There is also opportunity to grow rates compared to the 2012 (Jan – Dec) provincial averages:
  - 2012 Provincial Average Daily Rate: $110.41 (minus St. Johns), Eastern $109.19;
  - 2012 Provincial Revenue Per Available Room: $44.86 (minus St. Jonhs), Eastern $39.10;[46]
- There are several communities (exp. Trinity, Bonavista, Ferryland) that have tourism assets with capacity and the potential to attract higher levels of visitation (exp. Rising Tide Theatre, Colony of Avalon), however, that potential is not being realized because there is not adequate accommodation options to service guests who have a desire to visit these communities especially in high season;
- There are limited accommodation options in some parts of the region (exp. Winterton) that have visitor assets (exp. Wooden Boat Museum) that restrict the community's ability to stimulate visitation beyond a day trip; this limits economic impact to that community;

46 Source: TDMS Data pull from TCR. File name: Occupancy REVPAR and ADR Levels for Province and Regions 2011 to 2012.xls

- It is reported that there are a number of unlicensed accommodation properties within the region that visitors are accessing, however, the specifics of these accommodations and their impact on the licensed properties is not known; and
- Corporate transient business (oil and gas workers) annually consume a significant number of room nights and provide mass block bookings throughout the region removing inventory could typically go to tourists; this has direct impact on the destination's ability to grow tourism visitation and revenues.

IMPLICATIONS/CONSIDERATIONS

- Communities with limited accommodations should encourage accommodation development through municipal incentives and other economic development strategies to lure potential developers;
- Accommodations inventory is likely to diminish over time as there are limited buyers in the market for existing accommodation businesses, hence, some are likely to go out of business;
- These same communities should consider allocating public lands for the development of public or private RV and camp sites; these are low cost accommodation options that could quickly increase the inventory rather than placing the focus on attracting investment for roofed accommodations;
- Demand drives supply, therefore, communities that have accommodation deficiencies must continually create new reasons for people to visit, especially in shoulder seasons, which in turn may encourage developers to invest in accommodation properties; and
- Extending the length of stay of current visitors, as well as extending the season in which current and potential visitors come, maximizes accommodation revenue and helps maintain the business health of accommodation operators.

Culture – Heritage Based Assets

IB4: The Eastern Region has cultural and heritage tourism assets at a variety of price points. [YES]

Table 16: Number of Culture-Heritage Based Assets in the Eastern Region

Type	# Of Properties	Adult Price Range
Gardens	19	Donations to $7
Archeological sites	4	$8.50 to $9.50
Art Galleries & Murals	6	$3.00 to $35.00
Artists in Residence Program	1	Varies
Economusee	1	Free
Genealogy	7	$8.50
Lighthouses	5	$35 to $375
Monuments / Memorials / Plaques	13	Free to $5.00
Museum / Cultural / Historical Attractions	19	Free to $8.00
National Historic Site	8	Donations to $3.00
Performing Arts - theatres (Rising Tide, New World, Garrick, Grand Banks)	4	Free to $55

Provincial Historic Sites	6	Not available

KEY FINDINGS

- The region has 122+ culture and heritage assets that offer visitors a good variety of experience on many different levels;
- The assets have national, provincial, regional and local significance and attempt to articulate the natural and built heritage in the region;
- The celebration of the natural and built heritage of the region varies at these sites; the majority are passive and self-discovery, but some have animated presentations;
- The majority of these assets are not-for-profit operations and many are facing issues related to on-going sustainability of their operation;
- The majority of these assets are underdeveloped; they require enhancements and upgrades from basic infrastructure deficiencies (i.e. the roof leaks) to more comprehensive program development (i.e. exhibit animation);
- A significant number of these assets rely on volunteers to maintain and present the various stories associated with the asset;
- Government funding programs provide some assistance related to infrastructure development and staffing but the availability of funds has diminished in recent years putting significant strain on the assets present;
- Assets attract visitors on an annual basis primarily in high season;
- Visitor admission varies from free of charge to below a $10 average; and
- There are several reoccurring asset themes where likeminded assets are present at a number of sites throughout the entire region:
  - Emerging Themes:
  - Fishing Heritage – Fish plants, docks, heritage sites etc.
  - Local Crafts People – Newfoundland Treasures.

IMPLICATIONS/CONSIDERATIONS

- The cultural and heritage assets found in the region are a cornerstone of Eastern Region's attractiveness and appeal. The ability to grow tourism into the future rests on the continued investment in these unique tourism assets to ensure the visitors can connect with the people and places that are unique to the many communities. A proactive and innovative sustainability strategy must be developed to continually enhance the appeal of these fundamental tourism assets, the business model fundamentally re-examined;
- There is a shared responsibility and benefit for the public and private sectors to improve and enhance the attractiveness and appeal of these assets, governments specifically must remain active with asset development and sustainability by continually exploring opportunities for strategic investment;
- The EDMO should facilitate tourism development that focuses on the themed tourism assets that are found within the region, i.e. fishing trail, local crafts and artisans.
- Operators must also proactively develop their own sustainability strategies by undertaking a critical review of their current operations, for example, operators should;
  - Consider ways to move from presenting culture and heritage products to staging and engaging unique tourism experiences, often this involves low or no cost program development;
  - Consider presenting visitors with options for on-site programming (that charge a fee above the cost of general admission) plus explore ways to engage using technology;
  - Collectively assess if introducing admission fees for all sites would be an option and create a level playing field and consistent visitor expectation.

Nature Based Assets

IB5: The Eastern Region has nature-based assets at a variety of price points. [YES]

Table 17: Number of Nature Based Assets in the Eastern Region

Type	# of Sites/Properties	Price Range
National Parks	0	
Natural Attractions	27	$2.00 to $5.00
Provincial Parks	20	$5.00 to $58.00
Community Parks	56	Free and donations
Geology Fossils; Mistaken Point, Fortune Head, Geo Park (in development) etc.	3+	Free & varies
Look out/viewing	15	Free
Ecological Reserves (some not accessible)	12	Free
Seabird Ecological Reserves	5	$2.50
Wildlife Reserves	2	Free
Beaches	12	Free to $6.00

Key Findings

- There are 152+ nature based assets found in the region each that currently have, or the potential to have, a level of visitor engagement through a wide variety of activities and price points;
- Assets do attract visitors on an annual basis primarily in high season:
- Most nature based assets are offered to visitors free of charge to an average of below $6.00;
- There are a limited number of nature based assets available off season;
- There are 19 ecological reserves offering numerous passive and active tourism experiences for visitors;
- There are several existing assets and new projects in-development connected to geology; this level of critical mass offers an opportunity for the development of a themed story presented throughout the entire region, for example;
- Geology Treasures – Mistaken Point, Fortune Head, GEO Park, pending UNESCO status

Implications/Considerations

- Nature based assets are core to the destinations offering, however, these assets are not being fully leveraged to maximize revenues. Focus should be directed at developing strategies to better leverage these assets to increase tourism revenue, no longer should this asset be given away, for with time, appreciating their value relative to maintaining them will not be known;
- Staff and volunteers should be encouraged to continually enhance the visitor experience by finding opportunities to ensure there is a range of ways a visitor can engage, thus creating a greater sense of place through higher engagement and interaction with guests; this supports charging higher admission rates or for program; and
- Where critical mass exists in terms of nature based assets, these should be developed pan regionally, i.e. geology and ecological reserves.

Trails and Routes

IB6: The destination has driving routes that direct visitors through the Eastern region (e.g. an Arts Trail). [YES]

IB6.2 The destination has a variety of activity-based trails through the region to engage guests, (E.g. East Coast Trail, snowmobile trails, horse-back riding trails, ATV trails, etc.). [YES]

IB6.3 The destination has a variety of walking trails through the region to engage guests. [YES]

Table 18: Trails & Routes in the Eastern Region

Type	Exist?	# Routes
Themed driving routes with interpretation	No	
Themed driving routes with signage	Yes	
Walking/hiking with interpretation	Yes	
Walking/hiking with signage	Yes	
City/town based heritage interpretive trails	Yes	
ATV Trails		1+
Back Country Hikes		38
Coastal Trails		27
Hiking and Walking Trails		63
Town and Country Treks		14
Trails in National and Provincial Parks		4
Horseback Riding		1
Snowmobile Trails		2
Cross Country & Snowshoeing Trails		3

Key Findings

- Activity-based trails for walking, hiking, biking, horseback riding, ATV, snowmobiling are a core tourism asset within the region;
- The majority of trails are signed to provide directional information to users;
- Nature based assets are core to the destinations offering, however, these assets are not being fully leveraged to maximize revenue from visitors; and
- For the most part trail access is FREE generating little or no revenue for trail maintenance and enhancement or offering little or no direct economic impact locally, regionally or provincially.

IMPLICATIONS/CONSIDERATIONS

- Consideration should be given to investing in layering new opportunities onto existing infrastructure based tourism assets (the trail which has a no/low cost to enjoy) to activity based opportunities (horseback riding, mountain biking etc. – minimal cost to participate or licensing agreements that could involve a fee for trail maintenance/reinvestment) to program based experiences (interpretive services, events like Roots Rants and Roars – with a program or special event fee).

Recreational and Man-Made Attractions

IB7. The Eastern Region has man-made attractions at a variety of price points. [ALMOST]

Table 19: Recreational & Man-made Attractions in the Eastern Region

Type	# Of Sites/ Properties	Price Range
Ski/ Snowboard hills	3	Free to $50
Golf courses & Driving Ranges	12	
Recreational /Theme/Fun Parks	4	
Zoo's, aquariums, planetariums, science centre's	5	
Recreational Sports: Paint ball, Mini-putt, rock climbing	2	
Other: Horseback Riding	1	
Sports fields (soccer/football/baseball) that attract major national/international events and have accommodation options in close proximity	Limited - Multiple community venues must be used	
Arenas, gymnasiums that attract major national/international events (hockey, figure skating, basketball, volleyball) and have accommodation options in close proximity	Limited - Multiple community venues must be used	

KEY FINDINGS

- There are a limited number of recreational or man-made assets in the region;
- These assets have greatest appeal to local area recreationists but are not tourism demand generators visitors;
- Several communities have assets that have potential to attract sports related tournaments and events and several communities currently partner to host regional or provincial events (Clarenville, Bay Roberts, Carbonear, Harbour Grace); and
- There is limited capacity at sports fields, arenas, and gymnasiums for larger events or tournaments, such as those held on a national level.

IMPLICATIONS/CONSIDERATIONS

- Opportunities to grow sport tourism is limited due to the lack of capacity of the various sporting venues, when current events are held they utilize facilities in many communities; this is not the best case scenario for tournament or event organizers;
- Opportunities to grow sport tourism is limited due to the lack of accommodation options available in communities that have built recreational assets; and
- Given limited resources to invest in tourism development, this is not a priority.

Shopping & Retail

IB8: The Eastern Region has shopping and retail at a variety of price points. [YES]

Table 20: Shopping and Retail Businesses in the Eastern Region

Shopping and Retail Businesses	# Of Properties	% Year Round*	% 6 month + operation*	% high season only*
Antique Dealers	12	25 (36%)	7 (10%)	18 (26%)
Art or Craft Studios	31			
Commercial Art Galleries	34			
Craft Shops	61			

** Note: Not all operators provided this information*

KEY FINDINGS

- There are 69+ unique shopping opportunities offering a good variety and selection in many locations throughout the region, however, only 36% are open year-round;
- There are 31+ art craft / studios featuring locally produced products, which are of high interest to visitors;
- There is development happening in terms of promotion of the availability of locally produced crafts, for example the creation of the Artisan Trail on the Discovery Trail;
- IBRD has created the Crafts of Character certification program designed to authenticate the crafts produced in Newfoundland;
- Visiting craft/gift shops and National Historic Sites were the top two activities of non-resident travellers to the Eastern Region at 54% and 50% respectively;[47]
- "More than three in five (62%) non-resident parties rated their satisfaction with shopping for Newfoundland and Labrador produced crafts as 8 or higher on a ten point scale;"[48] and
- "The average satisfaction rating on a 10 point scale whereby 1 was *"not at all satisfied"* and 10 was *"very satisfied"* was 7.76 for non-resident parties, with non-resident parties visiting the province by air reporting a higher average satisfaction level than visitors by automobile."[49]

IMPLICATIONS/CONSIDERATIONS

- Purchasing local arts and crafts remains important to visitors therefore, it is important to support existing retailers especially those providing a unique retail experience;
- Foster development of initiatives such as developing an artisan experience category that develops new visitor opportunities and is aligned with the quality standards of the Craft Council of NL and the Crafts of Character Certification[50] on a regional basis;
- Partners should connect with the Craft Council to ensure the opportunities for tourism and artisan sales are leveraged for the benefit of the artist and visitors; and
- Artisans are encouraged to develop learning based experiences within their studios, galleries and shops, these hands on experiences can be sold to visitors representing a potential additional revenue source for retailers.

[47] Government of Newfoundland and Labrador – Department of Tourism, Culture and Recreation 2011 Exit Survey: Profile of Non-residents Visiting the Eastern Region (Economic Zones 15-16), pg. 7
[48] Government of Newfoundland and Labrador – Department of Tourism, Culture and Recreation 2011 Exit Survey: Profile of Non-residents Visiting the Province's Craft/Gift Shops, pg. 2
[49] Ibid
[50] http:www.craftcouncil.nl.ca

Culinary, Food and Beverage

IB9.1 The Eastern Region has restaurants with a variety of options and price points. [ALMOST]

IB9.2 The destination offers food and beverage options that respond to the needs of various travellers. [NO]

IB9.3 The destination offers other culinary themed establishments that purposely attract visitors. [ALMOST]

Table 21: Standard Culinary, Food and Beverage in the Eastern Region

Food and Beverage	#	% Year Round	% 6 month + operation	% high season only	# with critical acclaim	# with accredited chef	Range of main entree
Total Number *	170*	78%	12%	6%	20	1	$2.00 to $40.00
Casual Dining	125						
Catering	8						
Fine Dining	16						
Fast-Food	37						
Coffee Shops	26						
Bakeries	3						
Pubs/Bars	62						
Other	8						

* As reported by E-Dining (Restaurant Association of Newfoundland and Labrador (RANL) - some establishments count in several categories.

Table 22: Specialized Food and Beverage Options in the Eastern Region

Food and Beverage*	Number	Percentage
Vegetarian/Vegan	115	68%
Gluten Free	30	18%
Heart Healthy (e.g. low sodium, low fat, whole grain)	39	23%
Local foods (from the region)	93	55%
Local Newfoundland recipes	102	60%
Local beverages (wine, beer, ciders)	69	41%
Ethnic food (Chinese, Greek, Italian, etc.)	14	8%
Child menus	122	72%
Senior menus	3	2%

* As reported by E-Dining (RANL) - establishments self determine and report on their offerings. The TDVAA Advisory Committee could not support the reported findings.

Table 23: Culinary Themed Establishments in the Eastern Region

Culinary	# of Properties	% Year Round	% 6 month + operation	% high season only	# with Hands-on Experiences
Culinary Schools	2				
Vineyards/Wineries	1	1			(tour/tasting)
U-pick	0				
Farm Gate/Fresh Sea Food	Pending				
Root Cellars	133*	N/A			
Breweries	Iceberg				
Farmers market	1			1	
Farms/Organic Farms	19	3	2	14	

* While there are 133 root cellars not all are open to the public.

Key Findings

- There are 170 dining establishments reported within the region plus 62 pubs/lounges;
- The majority of F&B establishments are open year-round;
- 20 establishments report having critical acclaim;
- 93 F&B providers are using local Newfoundland ingredients and recipes which has high appeal among non-resident travellers;
- There are few culinary based experiences available in the region other than the unique and

interesting root cellars found throughout the region and the root cellar visitor experiences in the town of Elliston;
- Only 3 establishments report to offer senior specific menus;
- Quality and service delivery is not part of the scope in this project, however, during industry consultations the quality of F&B experiences in the region in terms of food choice, quality and service was raised as a concern;
- The College of the North Atlantic, Bonavista and Burin Peninsula campuses offer an accredited 34 week culinary training program providing students with the opportunity to receive their Red Seal Certification;
- The Bonavista Institute for Cultural Tourism offers food service training, menu development, food preparation and presentation but does not "certify" chefs; and
- Industry reports that the RANL E-Dining directory may not be fully accurate; it is populated by the F&B operators. It's suggested information in the database might be incomplete and not accurate.

IMPLICATIONS/CONSIDERATIONS

- F&B options are adequate, however, areas where improvements are necessary were identified during the industry consultations, more specifically related to guest expectation vs. food experience;
- This is a major area of concern as increasing numbers of visitors now make destination travel choices based on the availability of a quality F&B experience and there is the emerging 'foodie' traveller to whom experiencing the local food is a major motivator;
- During industry consultations it was agreed there is a significant labour deficit related to availability of trained cooks, chefs and kitchen staff;
- Only 1 establishment reported having an accredited chef, it is felt that restaurateurs do not want to report that they have an accredited chef in the E-Dining directory fearing their chef will be recruited by another F&B establishment; and
- While the colleges deliver basic to certificate F&B programs those students who successfully complete their training do not remain in the destination, they move away to other destinations where job prospects and wages are greater.

Conference, Convention, Trade Show

IB10: The destination offers conference, convention, and trade show space to serve as a primary draw for markets of different sizes. [NO]

Table 24: Conference, Convention and Meeting Space in the Eastern Region

Conference/ Convention Centres/Meeting Space		Hotels/ Resorts	Retreat Centres	University / College
Number of Venues	24	This level of detail not provided		
Person Capacity (Theatre seating)	Range 30 to 800			
Person Capacity (Ballroom rounds/seating)	Range 30 to 400			
Trade show or exhibit space (square footage)	Range 1,000 to 5,670			
Plenary Space and Break Out Rooms	16 sites			
Onsite Catering	16 sites			
Onsite AV Equipment/ Support	12 sites			
Sufficient overnight accommodation	9 sites			

KEY FINDINGS

- While there are 24 venues that have meeting space and report hosting meetings, conferences and

conventions, very few have the capacity to drive the Meetings & Convention (M&C) potential relative to the competitive lure of St. Johns;
- Current M&C business is mostly day traffic from small corporate, government and association meetings with minimal overnight accommodation being consumed;
- Meetings are local or regional in nature and the current venues meet the needs of meeting and conference planners;
- Limitations in the accommodation base is a barrier to the region fully leveraging the potential the M&C market represents; and
- Anecdotally, several operators report a decline in their meeting business as a result of government budget reductions; another reported an increase in small meeting business from the oil and gas sector.

IMPLICATIONS/CONSIDERATIONS

- It is suggested that the EDMO allow individual accommodation and meeting venue operators to continue to pursue this business and destination development focus be directed to other higher yield visitor opportunities.

Activity-Based Tourism Businesses (AB)

AB1: The destination has activity-based businesses offering a range of activities for visitors to engage in. [YES]

AB2: The destination offers flexibility and choice for length of engagement, level of interaction, price point. [YES]

AB3: The destination has a number of tour operators that package and sell domestically. [YES]

AB4: The destination has a number of tour operators that package and sell internationally. [YES]

Table 25: Activity Based Tourism Businesses in the Eastern Region

Activity Based Companies	# Of Visitor Opportunities	Seasonality		
		% Year Round	% 6 month + operation	% High season only
Total Number of Companies	**N = 36**	**25%**	**42%**	**33%**
Angling	3	33%	33%	33%
ATV	1	100%		
Biking	0			
Bird Watching	6		66%	33%
Bird Watching Boat Tours	12		83%	17%
Bus	2	100%		
Canoeing	2			100%

Activity Based Companies	# Of Visitor Opportunities	Seasonality		
		% Year Round	% 6 month + operation	% High season only
Caving	0			
Climbing	0			
Cross-country Skiing	1			
Diving and Snorkeling	2			100%
Dog Sledding	0			
Downhill Skiing	1			
Escorted Motor Coach Tours	0			
Escorted Tours and Excursions	2			100%
Flightseeing	1			100%
General Sightseeing	2			100%
Hiking and Walking	7	28%	15%	57%
Horseback Riding Tours	1			
Ice Climbing	0			
Iceberg Watching	7			100%
Iceberg Watching – Boat Tour	9			100%
Kite Sailing	0			
Learning Vacations	5	60%		40%
Multi Adventure Tours	0			
Nature and Wilderness	11	9%	64%	27%
Photography	3	67%		33%
Rafting	0			
Recreational Fishing Boat Tour	0			
RV Tours	0			
Scenic Touring	6	0%	33%	67%
Sea Kayaking	3			100%
Personal Watercraft	0			

Activity Based Companies	# Of Visitor Opportunities	Seasonality		
		% Year Round	% 6 month + operation	% High season only
Self Drive Touring Vacation	0			
Snowboarding	0			
Snowmobile	1			100%
Snowshoeing	1			100%
Step On Guide	0			
Tour Package	3	33%	33%	33%
Tour Planning	2	100%		
Tuna Fishing	0			
Walking	2		50%	50%
Whale Watching	7		14%	86%
Whale Watching Boat Tour	11		28%	72%
Winter	0			
Winter Caving	0			
Zip Lining	0			

Table 26: Characteristics of Eastern Region's Activity Based Companies

Activity Based Companies Characteristics	# Of Assets	% Of Assets	Price Range
Program Length			
1 hour programs (or less)	5	14%	$5 to $260
2 – 3 hour programs	21	58%	$10 to $260
Half Day programs	7	19%	$35 to $260
Full Day activities	8	22%	$60 to $340
2 – 3 day excursions	3	8%	$304 to $416
4 – 7 day excursions	9	25%	$1,000 to $10,000
8 – 10 day excursions	7	19%	$1,400 to $4,000
11 – 14 day excursions	2	6%	n/a
Program Dynamics			
Single site-based activity	19	53%	

Activity Based Companies Characteristics	# Of Assets	% Of Assets	Price Range
Multi-destination based activity	17	47%	
Guided	32	89%	
Self-discovery	3	8%	
Experience Dynamics (Answered to the best of their ability)			
Educational	30	83%	
Physical	24	67%	
Social	34	94%	
Spiritual	0		
Connects you to the place	34	94%	
Connects you to the people	34	94%	
Connects you to the culture	34	94%	
Engages the senses	35	97%	
Interactive/hands-on engagement	35	97%	
Unique to Newfoundland & Labrador	35	97%	
Behind-the-scenes experience	1	3%	
Skill			
No skill required (e.g. never kayaked)	23	64%	
Some skill required (e.g. paddled a few times, know a bit about kayaking)	31	86%	
Highly skilled requirements (e.g. certified/experienced kayaker).	13	36%	
Availability			
Sell direct to travellers	36	100%	
Packaged Independent Travel options	21	58%	
Group Travel Options	34	94%	

KEY FINDINGS

- Activity-based businesses offer a range of visitor experiences for travellers;
- The destination offers guests activity-based experiences that capitalize on the unique natural land and waterscapes found in the region; 18 wild life viewing locations, 18 whale watching locations/operators, 9 iceberg watching locations/operators, 3 kayak/paddling operators, many of these experiences are unique to Newfoundland and Labrador;
- There is a good variety offered in terms of program length, price point, dynamics, experiences, range of skill required, sales distribution channels (direct, tour operator); and
- The majority of activity-based experiences are only available in high season.

IMPLICATIONS/CONSIDERATIONS

- Activity-based businesses provide the core tourism demand generators for the region. Focus should be directed at monitoring the on-going health of both public and private sector operators in order to ensure these tourism assets are fully leveraged and they are able to continually refresh their product and be encouraged to develop higher yield programs or experiences offer and increase the length of stay and enhance revenue opportunities for others in the region;
- Growth in business and revenue for core activity-based operators (whale and iceberg watching and kayaking, for example) will come as operators evolve their offering by including new and enhanced experiences that support higher fees; and
- The EDMO, among others, should assist operators by ensuring they have the tools (Consumer research, examples of best practices, etc.) to remain competitive and appealing.

People/Program Based Tourism Businesses (PB)

PB1: The destination has people/program based businesses that offer a range of experiential program providers contributing to the visitor experience in the Eastern Region. [YES]

PB2: The destination hosts a number of regularly offered festivals and special events in the Eastern Region. [YES]

PB3: Festivals and special events that are offered on a regular basis (e.g. annually) bring critical acclaim to in the Eastern Region. [YES]

Table 27: Eastern Region's Program Based Companies

Program Based Companies	**# Of Assets**	**Seasonality**			**# with critical acclaim**		
		% Year Round	% 6 month + operation	% high season only	Provincial	National	International
Boutique Guiding Companies	2			100%			
Storytellers	7			100%		2	1
Artisans (Crafts, Quilters, Painters)	2			100%			
Musicians (Paid performers)	3	34%		66%	1	1	
Other	2			100%		2	

Table 28: Festival and Event Statistics for Eastern Region

Festivals & Events	# Of Events	# Of Attendees	Length			
			% 1-day	% 2-3 day	% 4-7 days	% 1 week +
Community	68	57,660	29%	26%	15%	18%
Cultural	7	8,150	14%	43%	0%	43%
Historical	9	2,900	11%	22%	0%	56%
Music	35	8,000	17%	37%	17%	20%
Performing Arts	19	27,200	16%	26%	11%	47%
Sports and Recreation	15	12,100	27%	20%	33%	20%
Winter	6	2,000	17%	17%	33%	33%

Table 29: Festivals and Events with Acclaim in the Eastern Region

Festivals/Events With Acclaim	Provincial Acclaim	National Acclaim	International Acclaim
Brigus Blueberry Festival (2-3 days, 15,000 attendees)	X		
Burin Heritage Weekend (2-3 days, 5,800 attendees)	X		
Bird Island Puffin Festival (4-7 days, 10,000 attendees)	X		
Eat the Hill	X		
Roots, Rants, and Roars	X	X	

KEY FINDINGS

- Program based businesses offer a range of experiential programming contributing to the visitor experience;
- There were 13 program based; story tellers, guides, craft, musicians identified, but the TDMS data base does not capture this vital element and therefore the potential people to contribute as experience providers may be higher;
- There is a good variety, program length, dynamics, experiences, range of skill required, sales distribution channels (direct, tour operator) offered to guests;
- There is a long list of festivals and events that are unique and in some cases bring critical acclaim to the destination; and
- Festivals and events are typically community based but reflect the culture and personality of the destination in unique and interesting ways.

IMPLICATIONS/CONSIDERATIONS

- Sustainability and business development opportunity for program based providers will rely on an evolution to offer more and enhanced experienced based opportunities that support higher admission/participation rates and fees;

- TCR should explore how to capture the missing program variables in their database recognizing that for some, they only contribute to tourism on a business-to-business level, whereas others may have a saleable consumer product; and
- Opportunities to extend the season, generate new wealth for the community providers, and the length of stay must be considered in any development efforts.

Tourism Demand Generators/Visitation Motivators

NOTE: This is a subjective assessment. It is based on several factors including visitation stats, critical acclaim, conventional wisdom, and suggestions by staff.

DG1: The destination has iconic tourism demand generators that are the primary reason for visiting Newfoundland and Labrador for domestic and international travellers. [YES]

DG2: The destination has secondary demand generators that, in combination with other tourism/community assets, motivate people to visit the destination. It contributes to the appeal but is not the primary reason to visit. [YES]

Table 30: Eastern Region's Primary Tourism Demand Generators

Demand Generators - Primary	Community/Location
Ferryland, Colony of Avalon, Lighthouse Picnics	Ferryland
Cape St. Mary's	Cape Shore
Town of Trinity	Trinity
East Coast Trail	Irish loop

Table 31: Eastern Region's Secondary Demand Generators

Demand Generators - Secondary	Community/Location
Rising Tide Theatre	Trinity
Fortune Head Interpretation Centre	Fortune
Wooden Boat Museum	Winterton
Cupids Legacy Centre	Cupids
Bonavista	Bonavista
Historic Town of Brigus	Brigus
Elliston Root Cellar Capital of the World, Puffin Site	Elliston

KEY FINDINGS

- The combination of primary and secondary demand generators provides a solid base of appealing, unique and compelling tourism assets to attract guests;
- Demand generators are not evenly distributed throughout the region;
- Demand generators are used in provincial marketing materials to differentiate the authentic ways to enjoy the region;

- Demand generators have critical acclaim on a provincial and national level; and
- Demand generators are primarily available in high season.

IMPLICATIONS/CONSIDERATIONS

- Demand generators can be leveraged to extend the length of stay and grow tourism revenues through layering additional experiences to the core reason to travel; tourism leaders may want to consider developing proactive strategies to engage guests beyond their this core reason for visiting; and
- The EDMO should consider facilitating a process that would foster the development of experience-based itineraries that leverage demand generators making it easy for potential visitors to plan more comprehensive travel practices.

4.2.4 Sustainability Dimension

4. This section provides a high-level assessment of the destinations' ability to thrive into the future by having in place plans and programs that contribute to the destination's long-term sustainability.		
Resource Base	Human Resources Sales & Marketing Environmental Economics Social/Cultural	Essential resource investments to sustain a viable tourism business and destination into the future.

Human Resources

HR1: There is sufficient labour pool to accommodate current and projected visitation levels. [NO]

HR2: The Eastern Region is promoting tourism as a viable career option. [NO]

HR3: Where labour pool constraints are occurring in the Eastern Region there is evidence of plans or strategies to address this challenge? [YES]

HR4: There is evidence the Eastern Region is making investments in tourism industry training and tourism business development within the last five years (2008 – 2013). [YES]

HR5: There is evidence in the Eastern Region of succession planning for tourism businesses. [ALMOST]

Table 32: Full Time Tourism Jobs in NL

Full Time Jobs[51]	2010	2015	2020	2025
Transportation	3,512	3,618	3,643	3,604
Accommodation	3,284	3,391	3,524	3,602
Food and Beverage Services	10,032	10,536	11,039	11,211
Recreation and Entertainment	1,701	1,731	1,800	1,844
Travel Services	410	422	419	404
Total Tourism Labour Demand (NL)	18,939	19,689	20,425	20,664

KEY FINDINGS

- To achieve the growth outlined in *Vision 2020*, and to meet the evolving needs of travellers, the sector needs skilled, knowledgeable staff and superior training. People and communities must understand the importance of tourism to the province's economic and social well-being, and the importance of their own roles in building a unique brand of service. People are an asset within a tourism context, investing in people will bring increased organizational benefits and higher levels of service to guests, enhancing their experience;
- While labour statistics are not specific to the Eastern Region the following provincial information is worth considering:
    - Tourism industries provide 18,000 jobs in NL; 8.5% of Provincial economy;
    - Spending on tourism goods / services projected to increase to $3.8 billion by 2030;
    - Increases in labour demand are present to a point of exceeding labour supply, the gap represents 3,553 full-year jobs left unfilled;
- Shortages could result in reduced levels of customer service, operating hours, consolidation, delayed investments;
- By increasing the rate of employment of entry-level occupations by just 1% per year over 10 years, there is potential to alleviate a significant portion of projected shortages;
- Well-designed training generates significant returns and compares favourably with other forms of investment;
- Consumers agree that lodging properties with formal employee training provide a higher quality of service (83%) and better value for money (67%);
- Training is being offered through; EDMO, HNL, Bonavista Institute for Cultural Tourism, College of North Atlantic programs, for example:
    - EDMO Front Line Staff annual two day training retreat – designed to enhance the visitor experience, this is a certificate program – approximately 50 participants per year
    - EDMO Fall Seminars focused on F&E, Regional Partnerships, Culinary Tourism Development, Packaging/Experience Development, approximately 30 participants per session offered live and in webinar format;
- There are several activities taking place to discuss succession planning including:
    - HNL Succession Planning Workshop/Webinars
    - IBRD Training Sessions
    - Community Development Organization sessions;
- The tourism sector has a poor reputation for training, likely due to high turnover; and
- Training is under-valued vis-à-vis expansion or other capital investments.

[51] Attracting and Retaining Tourism Talent, *Current Labour Issues and Future Challenges* Presented by: Jennifer Hendry | Director, Research Canadian Tourism Human Resource Council, HNL Board of Directors Meeting, March 23, 2012

Implications/Considerations

- HNL, in partnership with government and industry sector associations, has a role to play in understanding labour issues and putting proactive strategies in place to address the situation, consideration should be given to:
  - Increasing the attractiveness of tourism jobs for employees in traditional labour pools by profiling those who work in the industry and are fulfilled doing what they're doing;
  - Promoting tourism as a viable career;
  - Encouraging business/education partnerships (Canadian Academy of Travel & Tourism, co-op/internship programs, work exchange opportunities); and
  - Recruiting employees from new labour pools like mature and disabled workers.
- The Labour Market Division of the Department of Human Resources has introduced a number of initiatives to address the labour situation. HNL in partnership with government and industry sector associations should consider understanding, partnering, and leveraging these initiatives as appropriate for the benefit of the tourism sector. In the *Maximizing Opportunities: Current and Planned Initiatives*[52] document there is a list of recommendations that includes but is not limited to the following:
  - Maximizing Opportunities: Current and Planned Initiatives[53]
  - Releasing "Opportunity and Growth: An Immigration Strategy for Newfoundland and Labrador"
  - Releasing "All the Skills to Succeed"
  - Opening a network of 14 Career Work Centres across the province
  - Devolving the CA/NL Labour Market Development Agreement
  - Releasing "Creating a Province of Choice: A Youth Retention and Attraction Strategy for Newfoundland and Labrador"
  - Launching www.JOBSinNL.ca
  - Launching www.NLHRmanager.ca
  - Launching SMARTFORCE NL
  - Introducing a new Apprenticeship Wage Subsidy program
  - Developing and maintaining strong partnerships
- Industry training must continue and equipping operators to be their best is important for sustainability of the tourism industry, therefore, tourism leaders must continue to deliver relevant training and equipping for operators and staff.

Sales and Marketing Practices

SM1: There is evidence that the Eastern Region tourism businesses are selling through multiple channels based on their website communications. [YES]

SM2: The Eastern Region tourism business's online sales are extended at the regional or provincial level, beyond what individual businesses are investing in, that is there are opportunities for businesses to use regional or provincial booking engines. [NO]

SM3: The Eastern Region contributes to a favourable market presence through its iconic and primary demand generators. (E.g. are the attractions that drive visitation being used to market the province?). [YES]

[52] Newfoundland and Labrador Labour Market: Outlook 2020, April 25, 2012 Labour Market Division, Department of Human Resources, Labour and Employment
[53] Newfoundland and Labrador Labour Market: Outlook 2020, April 25, 2012 Labour Market Division, Department of Human Resources, Labour and Employment

SM4: The Eastern Region invests/participates in activities that drive targeted market segments for their tourism business. [YES]

SM5: The Eastern Region has tour operators that package and sell the Eastern Region domestically. [YES]

SM6: The Eastern Region has tour operators that package and sell the Eastern Region internationally. [YES]

SM7: There is market demand for the range of tourism offerings that Eastern Region type is offering [YES]

Table 33: Tour Operator Sales & Distribution in Eastern Region

Availability/Distribution	Number	Percentage
Sell Direct to Travellers	36	100%
Packaged Independent Travel options	21	58%
Group Travel Options (Tour Operators)	34	94%

Table 34: Primary Tour Operators Serving Eastern Region

Domestic Tour Operators	International Tour Operators
Routes to Learning	Vision Atlantic Vacations
Wildland Tours	McCarthy's Party
Atlantic Tours	Audley Travel
Hanover Holiday Tours	Globus Monograms
	Bridge and Wickers

KEY FINDINGS

- The province leads the promotions and advertising activities for the Eastern Region. The EDMO provides a support role with FAM tours, ensuring their website information for the region is up-to-date and participate in the provincial travel guide;
- The EDMO is responsible for "persuading the resident market and tourists, already in the province, to travel throughout the various regions that make up the destination"[54];
- The Eastern Region has relationships with tour operators who market domestically and internationally;
- The EDMO has participated in the following trade shows:
    - Rendezvous Canada – international travel trade
    - GO Media, Canada Media Marketplace – international travel media
    - Atlantic Canada Showcase

54 EDMO (2013). The EDMO business plan: 2012 – 2014. *A document provided by the Executive Director.*

- The EDMO has participated in the following consumer trade shows:
    - Toronto Outdoor Adventure Shore
    - Ottawa Travel & Leisure Show
    - Saltscapes
    - Boston Globe Travel Show

Implications/Considerations

- The EDMO's broader mandate for destination management places their priorities more towards industry development, product development, quality assurance, training and building partnerships. However, they also have a considerable mandate and responsibility to work with TCR's marketing team to ensure provincial marketing efforts reflect the region's assets and services and attractions. EDMO is the conduit through which TCR relies on content for updating the NL Tourism website and travel guide, itinerary development and delivery of FAM tours, attendance at consumer and trade shows, package development, and social media content. As such, they rely heavily on the province to ensure a strong presence for their region, sub-regions and businesses.

Environmental/Social Practices

EDMO Mandate:

To establish and maintain a sustainable and competitive tourism industry within rural Eastern Newfoundland that will result in increased tourism visitation and spending, thereby creating economic and social benefits for the destination.

ESP 1: There is evidence in the Eastern Region of the use of environmentally responsible practices, relative to tourism (e.g. pro-active land-use planning, waste management, use of alternative technologies, energy/water conservation). [YES]

EPS2: There are monitoring programs in the Eastern Region that track the impact of human use on the assets. [NO]

ESP3: There are monitoring programs that track the environmental impact of tourism. [NO]

ESP4: There is evidence the local people, industry associations and groups engage in activities and events that attract visitors (e.g. heritage board, volunteer guides). [YES]

Key Findings

- There was very limited information on sustainability found in the reports and plans reviewed, albeit most projects address at a minimum financial sustainability, the environmental and social is thin; and
- There are volunteer organizations/groups that get involved in community-based volunteer activities in support of tourism.
    - East Coast Trail
    - Heritage Associations located throughout the region
    - Festivals & Events are primarily planned and run by volunteers

Implications/Considerations

- To optimally deliver on the EDMO mandate of increased visitation and spending, they should encourage operators who have social and environmental policies to ensure these are on the website, for this does have value to some consumers; and
- The EDMO should consider affirming their own position on the triple bottom line – be that people, planet and profits framework, or the social, economic and environmental.

Strategic Planning & Investment

SPI1: Tourism is recognized as an objective in long-term planning documents, strategies and plans in the Eastern Region. [ALMOST]

SPI2: The Eastern Region has a current strategy in place to guide their investments and product development activities. [ALMOST]

SPI3: The Eastern Region has a current marketing plan in place to guide their investments and promotional activities. [YES]

SPI4: In the past five years, capital has been invested in facility renewal, expansion or development in the Eastern Region. [YES]

SPI5: In the past five years, capital has been invested in product and experience development in the Eastern Region. [YES]

SPI6: The majority tourism businesses can survive without government funding. [ALMOST]

Key Findings

- Community reports reveals that tourism centric planning in municipal and town plans was driven by the need for economic development post fisheries collapse;
- The EDMO does have an annual Business / Marketing Plan approved by its Board of Directors but it has limited activities related to product development in the context of the findings in this report;
- The EDMO does not undertake traditional tourism marketing to the leisure market (with exception of attendance at select consumer shows), it does however, have a plan that utilizes strategies that target the travel trade and travel media, TCR provides input into these plans and its Board of Directors approves these strategies annually;
- Capital investments are not formally tracked, however, anecdotally it is known that public and private sector investments have been made in areas of product and experience enhancements;
- The EDMO has also invested in training to assist operators in understanding ways to invest in product development to enhance guest's experiences and drive increased levels of visitation. For example, a session was held in 2013 to assist festival and event producers to create events in shoulder seasons;
- An operator survey was implemented as part of the assessment appraisal and questions pertaining to investment were asked; however, response rate was very low, therefore, results obtained were not statistically valid. That being said many operators who responded did indicate they had made capital investments in their properties; and

- The type and amount of government funding needed to sustain tourism businesses beyond 2015 is unknown.

IMPLICATIONS/CONSIDERATIONS

- The EDMO is a young organization, the TDVAA provides substantial information that can guide and shape the 2014 – 2015 Business Plan update and help set priorities for the short and long-term future;
- The EDMO's mandate places them in a logical position to take a lead on the experience category development, thus ensuring the optimal weave of the place-based and story-based visitor opportunities unites multiple communities and aligns with the NL brand promise;
- All investment initiatives of the EDMO should be placed through the lens of their contribution to new visitor activities the new revenue potential they bring by layering the development of the infrastructure, activities and people-program based visitor experiences together. Special emphasis should be given to those that will drive non-resident travel to the region and extended stays; and
- The EDMO should take a lead role in developing a customer-centric approach to destination development, one that is driven by responding to the attitudes, values and motivations of the traveller.

4.2.4 Measures of Success

5. Measures of Success Dimensions		
Key Performance Indicators	Success Measures	Specific, measurable indicators of success against which to benchmark.

KPI4: The commercial accommodations base in Eastern Region has average year-round occupancy par or above the provincial average of 50.1% (2012). [NO]

KPI3: The Eastern Region offers year-round tourism opportunities for guests. [ALMOST]

KPI5: Occupancy from commercial accommodations is spread throughout the year in the Eastern Region. [NO]

Tracking tourism performance can vary by destination, be it on a national, provincial, regional or local level depending on the available data and the frequency it is collected. In Newfoundland and Labrador the TCR Research department routinely gathers a number of tourism statistics but availability to provide regional and sub-regional results is limited by sample size and budgets. Therefore this section captures and measures those areas of performance where reliable regional stats are available. Refer to the Tourism Barometer (Section 4.1) a broader snapshot of Eastern Region's tourism performance using a number of other performance indicators.

Table 35: Occupancy for Economic Zones 15 & 16

Economic Zone 15 and 16 Occupancy*						
Year	Room Nights Available	Room Nights Sold	Occupancy Rate	Room Revenue	ADR	RevPar
2012	276,136	113,795	41.2 %	$12,595,017.39	$110.68	$45.61
2011	257,876	110,307	42.8 %	$11,424,590.04	$103.57	$44.30
2010	252,980	107,157	42.4 %	$10,649,726.29	$99.38	$42.10
2009	246,435	104,526	42.4 %	$10,403,341.61	$99.53	$42.22
2008	243,498	92,732	38.1 %	$9,599,140.30	$103.51	$39.42
2012 by Quarter						
Q1	55,299	15,066	27.2 %	$1,517,893.84	$100.75	$27.45
Q2	69,032	26,377	38.2 %	$2,854,570.53	$108.22	$41.35
Q3	85,572	54,849	64.1 %	$6,401,913.06	$116.72	$74.81
Q4	66,233	17,503	26.4 %	$1,820,639.96	$104.02	$27.49
Year	276,136	113,795	41.2 %	$12,595,017.39	$110.68	$45.61

Source; Accommodation Module; TDMS. Data for 2012 is based on information received and entered into TDMS as of September 24, 2013

KEY FINDINGS

- The region has seen incremental growth in a number of core areas in the past few years, but falls short of being on par or above the provincial average in areas such as average expenditure on day trips, overnight trips and commercial occupancy rates;
- The Eastern Region receives the majority of visitation May to October; there are limited tourism opportunities in the remaining months and activities like snowmobiling, downhill / cross-country skiing and snowshoeing are available. Sports tourism (hockey tournaments) generates visitation in some communities during the winter;
- There were 32,638 room nights added into the Eastern Region inventory from 2008 to 2012; a 13.4% increase; and
- RevPar increased from $39.42 in 2008 to $45.61 in 2012;
- While the province collects a range travel data on a provincial basis statistical data for the Eastern Region is limited to accommodations information which limits their ability to track performance year over year.

IMPLICATIONS/CONSIDERATIONS

- There are a variety of different organizations that collect meaningful information at the provincial level, but only a limited number of these invest in the ability for regional data. Compounding the ability to paint a succinct picture is the impact of eliminating the Regional Economic Development structure and the regional boundaries associated with Eastern now, relative to the economic zones. Plus, significant cutbacks to the provincial tourism budget impacts the frequency studies can be conducted, and if there are only enough funds for a single lens, the provincial one benefits the greatest number of people but it leaves the regions with limited research to draw on; and
- There is an opportunity for the EDMO and TCR to discuss which portfolio of key performance indicators are readily available and could form the foundation of a solid set of metrics to build into their annual business plan; complete with an understanding of which the province could provide (and how often) and which the EDMO would need to invest in.

5. Implementation Plan

What Does Implementation Look Like?

The implementation process is an activity that will occur after this report has been accepted. The scope of the consultants' responsibilities concludes with providing implementation guidelines. Setting priorities, defining collaboration and determining budget implications occurs with key stakeholders as the next step.

The destination development process has been met with enthusiasm by tourism stakeholders in other jurisdictions across the country and is applicable in an Eastern Region context. This Destination Development Plan outlines the process for implementation once the report has been accepted. Implementation requires participation and engagement from stakeholders and success will come only if efforts begin from the ground up. Facilitated leadership will be provided by HNL and TCR, with direct participation from the EDMO Board and TDVAA Advisory Committee.

As a project of the Newfoundland and Labrador Tourism Board, they are accountable for implementation. Their role will be to ensure steps are in place to facilitate implementation and to monitor and evaluate progress and activity on a regular basis. The report outlines the key recommendations from a product development perspective for achieving the goals of *Vision 2020*.

Implementation will look different depending on the specific recommendation and as different individuals in different organizations become the champions for action. This report includes the recommendations, with assigned responsibilities that respond to a specific finding. Typically, responsibility for implementation will be assigned to Operators, the EDMO, HNL or TCR, ACOA, IBRD or a collection of several of these entities. In some cases recommendations will be assigned to an Implementation Task Team.

Prioritizing the Recommendations with Roles and Responsibilities

Prioritizing and assigning roles and responsibilities for implementation is critical in the planning stage. Recommendations will need to be prioritized to allow for successful implementation as there will be "low hanging fruit" recommendations (short-term: 2014 – 2017), followed by recommendations that will require longer lead times (long-term: 2018 – 2020). We recommend prioritization become a responsibility of the EDMO Advisory Committee in a process facilitated by the EDMO and with involvement from the NL Tourism Board. Once the recommendations are prioritized and roles and responsibilities are defined, the EDMO will work within its own framework and annual operation plan to facilitate the implementation of recommendations it is responsible for, including those that are operator centric. This activity will be included in the EDMO's destination development strategy that will unfold into the future.

Implementation strategies pertaining to recommendations that others are responsible for will be facilitated collaboratively by TCR, HNL, EDMO, ACOA, IBRD and others as appropriate. It is highly anticipated that as the TDVAA process is completed in other regions, common recommendations will emerge.

Implementation Task Teams

Upon approval of the Eastern Destination Development Plan, recommendations specific to the EDMO and its operators will be implemented, in most cases, by an Implementation Task Team (volunteers). For example, the report recommends the development of a Fishing Heritage experience category on a regional basis (a Discovery Trail project in the pipeline). As the benefactors (businesses/communities) and fishing heritage tourism assets are located throughout the entire region, the task team would be comprised of individuals who, have expertise, experience, interest in this project and are located throughout the region, not just those on the Discovery Trail (however we do realize initial output may have application on the Discovery Trail as these stakeholders are well along in proposed development strategies).

Using the Fishing Heritage project as an example, the EDMO would facilitate the formation of the regional task team and the development process with the team. Specific strategies, timelines, deliverables and accountabilities would be identified by the team. When necessary the team, through the EDMO, would draw in resources to aid in the steps of implementation.

Getting a Head Start on Action While Priorities & Budgets Get Set

This report identifies a series of actionable activities designed to make a positive contribution to the appeal of the Eastern Region in the immediate term, as well as over the long-term. Table 34 identifies the first steps towards implementation.

Table 34: The First Steps Towards Implementation

Task	Detail	Timing	Resp.
NL Tourism Board, HNL Board, TCR, EDMO approves/adopts/ accepts the study and its recommendations	HNL to facilitate the approval process The management team presents the study to the Boards, TCR for acceptance, approval and adoption	March Mtgs./ Presentations	HNL, TCR, EDMO
Advisory Committee prioritizes the recommendations	EDMO facilitates a prioritization process with the Advisory Committee. NL Tourism Board is accountable for implementation; keep them in the loop	April	EDMO
Reconsideration of budgets	Given that they would have been set in fall 2013	May June	HNL, EDMO
Formalize Implementation Process For EDMO/Operators	Develops implementation plan for high priority recommendations during the high season when operators are engaged	June – Aug.	EDMO
Formalize Implementation Process For Province/HNL/Others	Develops implementation plan for high priority recommendations to be implemented by those other than operators	June – Aug.	HNL, TCR
Identify operator Implementation Task Teams	Identify and populate task teams (max 3) with appropriate industry stakeholders and establish implementation process for each team	Sept, Oct	EDMO
Provincial/HNL Others Implementation	Develop list of implementation plans and deliverables with accountability to the Tourism Board	Sept.	HNL. TCR EDMO
Round One Implementation Roll Out	Monitor implementation activity, report quarterly on progress to Tourism Board, develop Eastern destination development report card to track activity and progress	Fall 2014 Winter 2015	HNL, TCR, EDMO
Destination Development Advocacy	Where advocacy is required to affect destination development implementation plans develop specific recommendation advocacy strategies	On-going	HNL

To help in the planning of getting a head start on short-term actions while the longer terms ones are discussed further, this final section suggest a number of items that can be actioned immediately and are organized according to the primarily responsible for delivering on the specific recommendation.

Operators:

- Audit your website to ensure the basic, expected elements are there with emphasis on, mobile friendly, a clear call-to-action, a Google map link, an ability to talk to a person year-round and make a reservation, and a link to your Facebook and TripAdvisor accounts.
- Revisit pricing strategies for those attractions whose tourism offering is provided for free or for a donation. By conducting a comparative review of other similar Canadian attractions. This is particularly important for nature based tourism operators (ecological reserves, trails, waterfronts) who are undervaluing the experiences they deliver.
- Embark on strategic packaging between accommodators and attractions so visitors have more options for staying and engaging in the region that is easily accessible.
- Identify and implement enhancements to your individual product offers that increases the customer engagement and experience (= value) and create a pricing structure that reflects the value delivered for enhanced experiences compared to your basic offering.
    - Create a higher yield per person by increasing the price point of existing tourism products, where the market can bear it. Where there is concern about the local area markets' willingness to pay, provide specials for the local market (e.g. Two for One Tuesdays).
    - Increase the number of visitor experiences (Infrastructure, activities and people/program) that delivers value to niche markets and commands a higher fee.

EDMO

- Access the free CTC EQ research[55] and begin to identify the core traveller types that are best aligned with the regions product offer as a point of departure in encouraging product and market development targeted to increasing the number and return from non-resident travelers.
- Coordinate the key stakeholders interested in collaborating to develop the lead experience categories.
- Engage in meetings with HNL and TCR regarding the strategic directions that assist the Eastern Region, but will also have provincial implications.

HNL

- Continue to work at, and advocate for removing or minimizing the barriers to advancing the tourism industry and priorities as outlined in the report, especially on transportation issues as many non-residents experience when trying to efficiently and affordably travel to NL.
- Revisit the training programs being offered to ensure they are reaching the operators most in need, and if needed, better target the invitation to improve participation and engagement. Host a business brainstorming session to discuss creative, shared solutions to staffing.

TCR

- Replicate the 2014 non-resident survey for resident travellers, amending the variables to survey NL resident travelers to gain insight into their travel relative to the sub-regions.
- Create an NL Brand Development Guide that describes the brand promise and brand position, and provides information to industry on a range of topics from 'who we are', to what NL is selling, customer profiles, experience categories that bring the brand to life, to promotions, media and advertising.
- Examine the merit in purchasing a provincial license for the CTC EQ research, and access to the Prism Geo-targeting information that can be secured on a 'pay as you play' basis that would provide immediate access to award winning national psychographic segmentation research on Canada, the USA and 9 core international markets.

[55] CTC Free EQ Profile Research: (https://en-corporate.canada.travel/sites/default/files/pdf/Resources/ctc_eq_profiles_2012-eng-lowres.pdf)

TCR, ACOA, IBRD, HNL

- Advocate for, and support increasing resources to the EDMO for two to three 3-year experience development positions to allow them to hire a full-time product/experience development expert (not a consultant) who can be in the field and on the ground, working with operators on an on-going basis to facilitate the development of new or enhanced experiences and lead the process for development of thematic experience categories.
- Explore establishing an Experience Development Investment Fund for private sector operators who can apply for seed funding for new experience development.
- Examine funding applications and processes to determine if the ability to prioritize awards to businesses who are providing holistic solutions to driving the visitor experience based on a combination of infrastructure, activities and programs can be rewarded.

RANL, TCR, IBRD, Educators & F&B Operators

- Identify and understand the challenges facing the F&B sector in the region and the impact these challenges are having on the guest experience. With this understanding, direct immediate attention must be paid to steps and actions that can be implemented to address areas of concern.

NL Tourism Board

- Amend the five noted *Vision 2020* goals as recommended to begin communicating the need for optimizing the investment focus needed to achieve the desired outcomes.

Appendices

Appendix 1: Contributing Stakeholders

The following individuals contributed to the TDVAA process for the Eastern Region.

Project Sponsor

Contracted the TDVAA and assumed overall management and budget responsibility for the project. They provided the link between the project manager and the organization's management or board of directors. Appointed staff was:

- Hospitality Newfoundland and Labrador; Carol-Ann Gilliard, Chief Executive Officer, Lisa McDonald, (Former) NL Tourism Board Manager, Lynn Taylor, (Current) NL Tourism Board Manager.
- Department of Tourism, Culture and Recreation, Government of Newfoundland and Labrador; Scott Andrews, Manager Strategic Tourism Product Development.

Project Manager and Assessment Team

Designed and led the process working closely with Project Sponsors, Data Collection Team, and the Regional Destination Project Lead. Contracted through an RFP was:

- Richard Innes, President and Carolyn O'Donnell, Senior Consultant of Brain Trust Marketing & Communications; and
- Dr. Nancy Arsenault, Managing Partner, Tourism Cafe Canada.

Regional Destination Project Lead

Oversaw the destination-based activities related to the Volunteer Steering Committee and the Data Collection Team. This ensured engagement and understanding of the project at the field level and served as a catalyst for facilitating and supporting the implementation of the recommendations in partnership with TCR and HNL. The Destination Project Lead for the Eastern Region appraisal was:

- Kathi Stacey, Executive Director, • Eastern Destination Management Organization.

Project Steering Committee

Provided input and feedback to the Project Sponsor at critical stages of project development and implementation. The committee is comprised of organizations responsible for leadership and implementation of tourism development activities at a regional level, as well as the various government partners involved in the project. Members included:

- Hospitality Newfoundland and Labrador, Carol Ann Gilliard, CEO, Lisa McDonald, (Former) NL Tourism Board Manager, Lynn Taylor, (Current) NL Tourism Board Manager
- TCR, Scott Andrews, Manager Strategic Tourism Product Development, Chris Tuck, Tourism Product Development Officer
- IBRD, Dion Sheppard, Regional Economic Planning Analyst
- ACOA, Betty Rumboldt, Account Manager Community Economic Development
- Eastern DMO, Kathi Stacey, Executive Director
- Adventure Central, Shannon Pinsent, Executive Director
- Western DMO, Mark Lamswood, Executive Director
- Destination Labrador, Randy Letto, Executive Director
- Destination St. John's, Cathy Duke, CEO, Rhonda Hutton, Director of Marketing

The TDVAA Advisory Committee (Industry Working Group)

The TDVAA Advisory Committee was comprised of tourism business owners/operators, experience providers, and destination management staff. Their role was to oversee the execution of the TDVAA process. They provided the local voices and perspectives important to the validation process, findings and ultimate recommendations.

Name	Business	Region
1. Derek Aylward	Marystown Hotel & Convention Centre	Heritage Run
2. Patti Broughton	Colony of Avalon	Irish Loop
3. Marieke Gow	Artisan Inn & Twine Loft	Discovery Trail
4. Irene Hurley	Cashel’s Cove Crafts – HRTA	Heritage Run
5. Peter Laracy	Cupids Legacy Centre	Baccalieu Trail
6. Bill Luby	Southern Avalon Tourism Assoc – Tutuit Jewelry	Irish Loop
7. Patrick Monsigneur	The Claddagh Inn	Irish Loop
8. Nancy Brace	Restaurant Association NL	All Regions
9. Barbara Brown	Blazing Horizon Cottages	Baccalieu Trail
10. Donna Butt	Rising Tide Theatre	Discovery Trail
11. Jerry Byrne	Ocean Delight Cottages, Shag It Café, Doctor’s House Inn and Spa	Baccalieu Trail
12. Linda Collier	Fortune Head Interpretation Centre	Heritage Run
13. Pat Comerford	Comerford’s Ocean View Suites	Admiral’s Coast
14. Krista Perry	Conception Bay South Manuals River	Admiral’s Coast
15. Stan Cook Jr.	Stan Cook Sea Kayaking	Irish Loop
16. Elroy Grandy	Burin Pen ATV Association	Heritage Run
17. Jean Knowles	Friends of Cape St. Mary’s	Cape Shore
18. Marilyn MacKay	At William’s Rest	Baccalieu Trail
19. Marilyn Coles Hayley	Bonavista Institute Cultural Tourism and Tourism Elliston	Discovery Trail
20. Larry Reid	Ski White Hills	Discovery Trail
21. David Ellis	Two Whales Coffee Shop	Discovery Trail
22. Helen Power	Southern Avalon Tourism	Irish Loop
23. Maureen Sullivan	Southern Avalon Tourism	Irish Loop
24. Brian Rose	Hotel Fortune	Heritage Run
25. Elizabeth Burry	Elizabeth Burry Studios	Discovery Trail
26. Edith Samson	Sir William F. Coaker Foundation	Discovery Trail
27. Jim Miller	Trinity Historical Society	Discovery Trail
28, Shelly Blackmore	Captain Blackmore’s BB	Discovery Trail
29. John Fisher	Fisher’s Loft Inn	Discovery Trail

Data Collection Team

Data collectors were responsible for gathering all secondary information (e.g. Community reports, research, and strategies) as well as the primary information related to specific information required for the appraisal process. Members were:

- Scott Andrews, TCR
- Jackie Harnum, TCR
- Krista Noseworthy, VIC Counsellor
- Melissa Samms, Student, St. John's
- Anita Keefe, VIC Supervisor
- Brandon Lace, Summer Student, Marystown IBRD
- Brittany Taylor, Summer Student, Marystown IBRD
- Jill Barrett – Summer Student – EDMO
- Andrew Hiscock – Tourism Development Officer - EDMO

Appendix 2: Glossary of Terms

Source of most definitions: *Department of Tourism, Culture and Recreation (TCR), and the Tourism Industry Association of Canada (TIAC).*

Accommodations: A facility licensed under the Tourist Establishment Regulations Act that provides overnight accommodations for remuneration. (TCR).

Art gallery: A gallery for the display of artistic works as defined by the Department of Tourism, Culture and Recreation. (TCR).

Attraction (tourism): Means a physical site or event with the primary function or ability to attract a traveller by providing experience of a recreational, educational, scientific, or entertainment nature, based on cultural and natural heritage resources or recreational facilities and services, but does not include a shopping centre or a recreational and an entertainment establishment which is commonly found in or near most urban areas that offer limited tourist attractions, including a bowling alley, cinema, sports field or an arena. (TCR).

Attraction (major tourism): A business, facility or site whose primary purpose is attracting and satisfying the needs of travelers of which the majority resides outside of the general area. The attraction is listed in of the Department of Tourism, Culture and Recreation. (TCR).

Business: Owns and operates one or more tourism assets that may be purchased and marketed independently or together (e.g. Terra Nova Resort and Golf Community or the East coast Trail).

Community festival: A special occasion sponsored or sanctioned by a Province, Federal, Municipal government or organization for a definitive time period. (TCR).

Community welcome sign: Means an advance sign installed by a community with one sign in each direction not more than 2km from the community. (TCR).

Confirmatory sign: A follow-up sign used as a supplement to enhance directional information with other approved tourist oriented directional signs such as fingerboards, and/or panel board signs. These are not permitted to be used independently. (TCR).

Craft shop: A premise whose principal use is the sale or display of crafts produced in the Province, as defined by the Department of Innovation, Trade and Rural Development. The craft shop is listed in the Tourism Destination Management System database of the Department of Tourism, Culture and Recreation. (TCR).

Designated hiking/walking trails: A hiking/walking trail that is recognized by the Department of Tourism, Culture and Recreation as a travel generator that is maintained and monitored by a group or organization. (TCR).

Eating establishment: A building or part of a building designed or intended to be used or occupied for the purpose of serving the general public with meals and refreshments at individual tables or booths with a minimum seating capacity of ten persons inside the establishment. (TCR).

Farm and fish markets: A seasonal retail establishment for the exclusive sale of agricultural or fishery products produced in the Province and includes U-pick operations and fish-out ponds. The primary purpose is the sale of local produce and other foodstuffs, rather than the retail sale of goods or other services. This category does not include greenhouses, garden centres, flower shops or similar establishments. (TCR).

Local road: A street that is primarily used to gain access to the property bordering it.

Local Tourism Attraction: means an attraction or business that generates a limited number of travellers that serves mostly the local customer base. The attraction is listed in the Tourism Destination Management System database of the Department of Tourism, Culture and Recreation. (TCR).

Major highway: Highway routes #1, 2, 3, and any route number ending in 0 or 5. (TCR).

Museum: A premises used for the display of Provincial and other artifacts, and includes an archaeological site, as approved by the Department of Tourism, Culture and Recreation. The museum is listed in the Tourism Destination Management System database of the Department of Tourism, Culture and Recreation. (TCR).

Non-resident tourist: A traveler from outside of a particular region, bringing new expenditures into the region. A non- resident tourist in Newfoundland and Labrador is coming from another part of Canada or another place in the world. (TCR).

Resident tourist: A traveler from within the province, who generates revenue through activity and travels to an attraction or destination within the province. A resident tourist does not bring new revenues into the province, but does use goods and services. (TCR).

Return on investment (ROI): Primarily, measurable positive economic impacts, including contribution to Gross Domestic Product (GDP) from the Tourism Industry, as well as higher employment levels, greater income earned by the tourism workforce and tax revenue to all levels of government. Secondarily, ROI considers community impacts, multiplier effects and business impacts. (TCR).

Theme park: A development whose primary function is the provision of amusement facilities and the attraction of the public into selected areas of the Province and includes golf courses, skiing operations, recreational resorts, walking or hiking trails and amusement parks with a minimum of three attractions. The theme park is listed in the TDMS database. (TCR).

Tourism: The definition of tourism follows that adopted by the World Tourism Organization and the United Nations Statistical Commission: “the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes”. (TIAC).

Tourism Assets: Individual guest opportunities that are marketed and purchasable, or packaged for a visitor to enjoy (e.g. 1 of 17 Trails of the East Coast Trail). It is also the unit of analysis that operators identify for their business to be categorized in the TDMS database (e.g. a resort accommodation and a golf course = two assets).

Tourism Destination Management System (TDMS): A database of tourism products and services managed by the Department of Tourism, Culture and Recreation. (TCR).

Tourism demand/spending: Is defined as the spending of Canadian and non-resident visitors on domestically produced commodities. It is the sum of tourism domestic demand and tourism exports. (TIAC).

Tourism domestic demand: Is the spending in Canada by Canadians on domestically produced commodities.

Tourism employment: A measure of employment in tourism and non-tourism industries. Tourism employment measures the number of jobs in an industry generated by, or attributable to, tourism spending on the goods and/or services produced by that industry. It is based on an estimate of jobs rather than “hours of work”. Thus, someone who works 10 hours a week counts for as much, by this measure, as someone who works 50 hours a week. (TIAC).

Tourism exports: Is the spending by foreign visitors on Canadian-produced goods and services. It includes spending that may take place outside of Canada, for instance, the purchase of an airline ticket from a Canadian international carrier, to travel to Canada. (TIAC).

Tourism gross domestic product: The unduplicated value of production, within the boundaries of a region, of goods and services purchased by tourists. In the NTI, GDP is calculated at basic prices in both current and constant dollars. Only direct GDP is calculated in the NTI. GDP is also generated indirectly in the upstream production chain of a good or service. Although these indirect effects can be linked to tourism, they are not included in tourism GDP. (TIAC).

Tour operation means a development established for the purpose of providing guided tours in areas of special interest. The tour operator is listed in the Tourism Destination Management System database of the Department of Tourism, Culture and Recreation. (TCR).

Travel payments: In the travel account are correspondingly defined to include all expenses incidental to travel abroad by residents of Canada. Among these are expenditures abroad for lodging, food, entertainment, local and intercity transportation and all other purchases of goods and services (including gifts) made by the travellers. The series thus includes any purchases of goods to be imported for personal use by travellers. Also included are medical expenses and education expenses of Canadian residents outside Canada as well as Canadian crew members' spending in other countries. Travel payments do not include international transportation fares paid by Canadian residents to foreign carriers. (TIAC).

Travel receipts: The travel account is defined to include all expenses incidental to travel in Canada by non-residents. Among these are expenditures in Canada for lodging, food, entertainment, local and intercity transportation and all other purchases of goods and services (including gifts) made by travellers. The series thus includes any purchases of personal goods to be exported by travellers. Medical expenses and education expenses of non-residents in Canada as well as foreign crew members' spending in the country are also included. Travel receipts exclude international transportation fares paid by non-resident travellers to Canadian carriers. (TIAC).

Visitor Economy: Encompasses everything that attracts visitors to a destination; everything that make a place special, distinctive and capable of engendering pride and interest and a place worth experiencing. A successful visitor economy requires managing all of the components in an integrated and long-term way, with a clear focus on the needs of the visitors the destination is seeking to attract and the destination brand.

Appendix 3: Bibliography

A list of the publications, reports, databases and source documents that informed the Eastern Region appraisal.

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Appendix 4: *Vision 2020* Alignment Summary

There are seven areas of investment identified in the *Vision 2020* plan that, in 2009, articulated 16 goal categories, each with two to five action items (Table 35). The recommendations associated with each finding have been placed within Table 36 to illustrate where they best align with the spirit of the goal statement (as opposed to specific actions item) relative to destination development for the Eastern Region.

Table 36: *Vision 2020* Goals and Primary Objectives

Goal	1. Private Public Leadership - A Partnership for Tourism Growth & Development
1.1	Establish a private public tourism board (within 3 months).

Goal	1. Private Public Leadership - A Partnership for Tourism Growth & Development
1.2	Strengthen stakeholder communication.
1.3	Lead through best practices.
	2. Sustainable Transport Network - A Transportation Strategy to Grow Our Industry
2.1	Build strong relationships with key transportation alliances that provide access to and from our province to meet the demand for affordable, accessible, and quality transportation.
2.2	Ensure efficient and easy travel, in and around, the province.
	3. Market Intelligence & Research Strategy - A framework for Accessible & Timely Research
3.1	Develop and implement a research strategy and plan that provides industry and government with relevant and timely information and analysis.
3.2	Establish performance indicators to annually measure the success of *Vision 2020*.
	4. Product Development - Delivering Strategic & Sustainable Travel Experiences
4.1	Develop and implement an experience strategy that resonates with sophisticated travellers, reinforces our unique brand and increases our return-on-investment.
4.2	Continue to improve government-owned tourism infrastructure.
4.3	Be a visible leader of environmental sustainability.
	5. Tourism Technology - Strengthening Our Information & Communications Technology
5.1	Ensure all tourism partners and operators embrace technology as critical elements in attracting visitors and enhancing their experiences and services.
	6. Marketing Our Brand - Building on the Success of Our Creating Marketing Campaign
6.1	Continue to build a successful, differentiated tourism brand and leading tourism marketing position.
6.2	Identify and pursue new and emerging market opportunities.
6.3	Ensure there is a clear understanding of the roles and responsibilities of all stakeholders in promoting the province as a destination.
	7.Developing Our Workforce - Growing Our People for a Dynamic Industry
7.1	Instill a sense of price, encourage a spirit of hospitality, and foster a positive relationship between our industry and the communities who will help us achieve *Vision 2020*.
7.2	Focus efforts on attracting and retaining a skilled tourism workforce.

Table 37: Eastern Region's *Vision 2020* DDP Recommendations Alignment

Finding	*Leadership*	*Transport*	*Research*	*Product/ Experience*	*Technology*	*Marketing*	*HR*	*Core*
1	1.2, 1.3					6.1, 6.3		
2			3.2	4.1		6.2	7.1	

Finding	*Leadership*	*Transport*	*Research*	*Product/ Experience*	*Technology*	*Marketing*	*HR*	*Core*
3			3.1	4.1		6.2		
4			3.1	4.1		6.1, 6.2		
5				4.1			7.2	
6			3.2		5.1	6.1, 6.3	7.1, 7.2	
7				4.1			7.1	
8				4.1				
9				4.1, 4.2				
10				4.1				
11								X
12				4.1, 4.2			7.1, 7.2	
13		2.1, 2.2						
14				4.1		6.1		
15				4.1		6.3	7.2	
16							7.1, 7.2	
17				4.1, 4.3				
18			3.1					
19			3.1					
20								X

Appendix 5: Projects in the Pipeline

Table 38: 28 Projects in the Pipeline Identified within the Eastern Region

Matthew Legacy Inc.	Marinas Clarenville, Petley & Arnold's Cove	Town of Lord's Cove - Lawn Islands Archipelago Ecological Reserve
Root Cellar Interpretation Centre, Elliston	Harbour Authority of Baine Harbour - Marina Expansion	Marystown Heritage Museum Corporation Facility Expansion
Bonavista Institute for Cultural Tourism	Town of Burin – Heritage Square Enhancements	Little Bay Heritage Centre, Inc. – Exterior Enhancements
Discovery Aspiring GeoPark Inc.	Winter Destination Development – Town of Clarenville	Town of Marystown – Jerome Walsh's Museum Restorations
Tourism Housing – Port Union Coaker Waterfront Development Plan	Fortune Head Eco Friends	Grand Bank Theatre, Lighthouse Productions
Artisan Trail – Cultural Craft Destination Development	Fortune Port Corporation – Facility Expansion at International Port	Placentia West – Museum and Craft Store Expansion
Fishing Trail - 500 Years of Fishing Heritage on the Bonavista Peninsula	Town of Grand Le Pierre - Flag Hill Park Development	St. Gabriel's Hall – Exterior Facilities Development
English Harbour Maze, Bonavista Peninsula	Little Bay Marina Committee – Recreational Marina Development	Town of St. Lawrence - Chambers Cove Trail Development and Interpretation
Romantic Destinations; Hearts Delight, Hearts Content, Hearts Desire, Cupids	Heritage Run Tourism Association - Goobies Visitor Information Centre Expansion	Multiple Municipalities – Walking/Hiking Trail Assessments • Little Catalina to Maberly • Burin Peninsula ATV Trail • Hike Discovery • Clarenville Nordic Ski Club, Trail enhancement • Burin Peninsula Trailway – Trail Construction Project
Cape Random – Implementation of Creative Stages Joe's Place	Marinas- Clarenville, Petley & Arnold's Cove	Town of Lord's Cove - Lawn Islands Archipelago Ecological Reserve
Matthew Legacy Inc.	Harbour Authority of Baine Harbour - Marina Expansion	Marystown Heritage Museum Corporation Facility Expansion
Root Cellar Interpretation Centre, Elliston		