North East Avalon

Tourism Destination Visitor Appeal Appraisal

Realizing the Possibilities

HOSPITALITY NEWFOUNDLAND & LABRADOR

NORTH EAST AVALON

Newfoundland Labrador

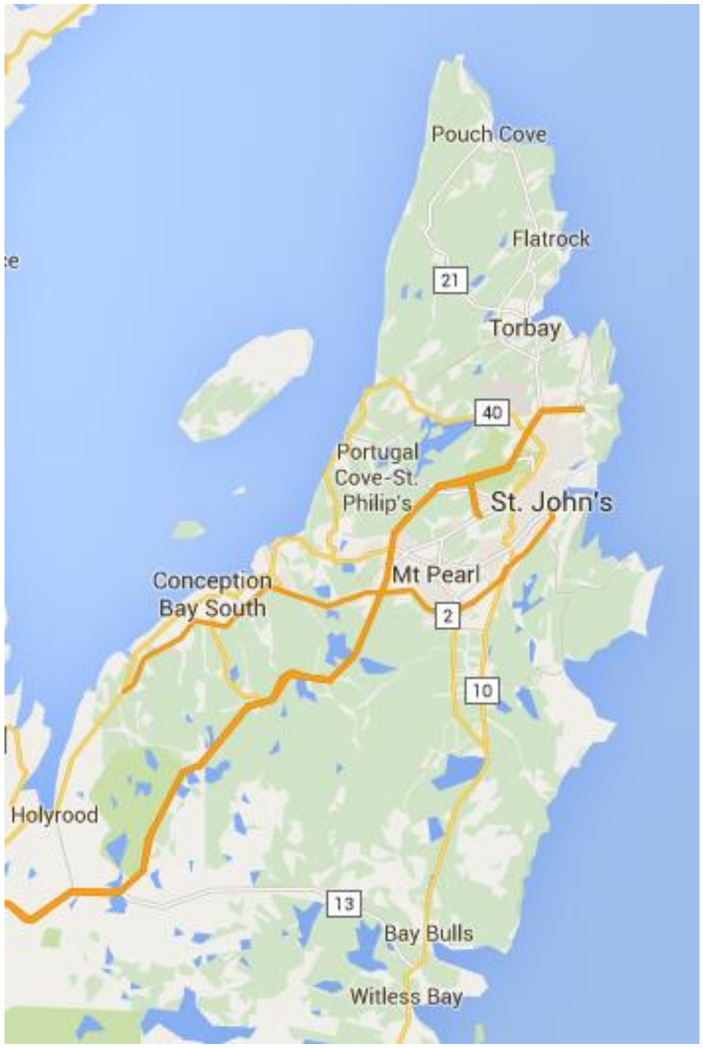
Atlantic Canada Opportunities Agency

Conducted by:

THE TOURISM CAFE

BRAIN TRUST Marketing & Communications

Map of the North East Avalon Region



Executive Summary

In 2009, the tourism industry and province of Newfoundland and Labrador (NL) released their vision to double tourism revenues to $1.58B by 2020. Titled *Uncommon Potential: A Vision for Newfoundland and Labrador Tourism (Vision 2020)* this document has been a blueprint for growth in NL guided by seven strategic directions. Underpinning the *Vision* is respect for home, residents, travellers, communities and profitability. In March 2016, *Vision 2020* was refreshed with updated the goals and objectives to reflect the accomplishments since the original release date in 2009, as well as the continued challenges heading into 2020.

VISION STATEMENT

Newfoundland and Labrador will 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

Strategic direction #4, experience development, is aimed at ensuring NL delivers memorable, travel experiences to attract visitors from around the world. This is the key to delivering on the provincial brand promise and bringing the brand to life based on the assets and attributes of a diverse array of natural and cultural heritage combined with the colorful character of the people.

To guide the regional strategic investments in product, experience and destination development, Hospitality Newfoundland and Labrador (HNL) in partnership with the Department of Business, Tourism, Culture and Regional Development (BTCRD) and the Atlantic Canada Opportunities Agency (ACOA), commissioned a customized Tourism Destination Visitor Appeal Appraisal (TDVAA) to be completed in each region. Led by Brain Trust Marketing and Communications and The Tourism Café Canada, the project team included HNL, BTCRD, ACOA and the North East Avalon (NEA) Primary Stakeholder Committee representing the NEA regional destination marketing and economic development organizations. The over-arching goals 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 increase the return on investment;
2) Continue to improve the visitor experience and visitor economy; and
3) Empower the region to be a visible leader of responsible, sustainable tourism.

Designed to take a visitor-centric approach, this study reviewed 18 documents, reports and studies combined, plus data from the Tourism Destination Management System (TDMS) and Restaurant Association of NL's (RANL) e-dining databases. This 14-month process (March 2015 – May 2016) incorporated insights from community and online stakeholder sessions from March 1st and 2nd, 2015 for the launch of the project, a return to the region for the follow-up stakeholder sessions in January 2016 and concluding with various Advisory Committee and government stakeholder sessions to refine the recommendations throughout the winter and spring of 2016.

The TDVAA process in the NEA region took on a slightly different organizational approach. Unlike the other four regions where work was led by the regional Destination Management Organization, the NEA region was led by a Primary Stakeholder Committee (PSC) that included, Destination St. John's (DSJ) and six sub-regional areas represented by their economic development or tourism officers (Town of Conception Bay South, Paradise, Torbay, Portugal Cove-St. Philips, the City of St. John's and City of Mount Pearl). Representatives from these municipalities served to represent a number of other smaller municipalities within the region. The role of this Committee is to serve as advisors and immediate "voice on the ground" working with the Regional Destination Project Lead and the TDVAA Advisory Committee.

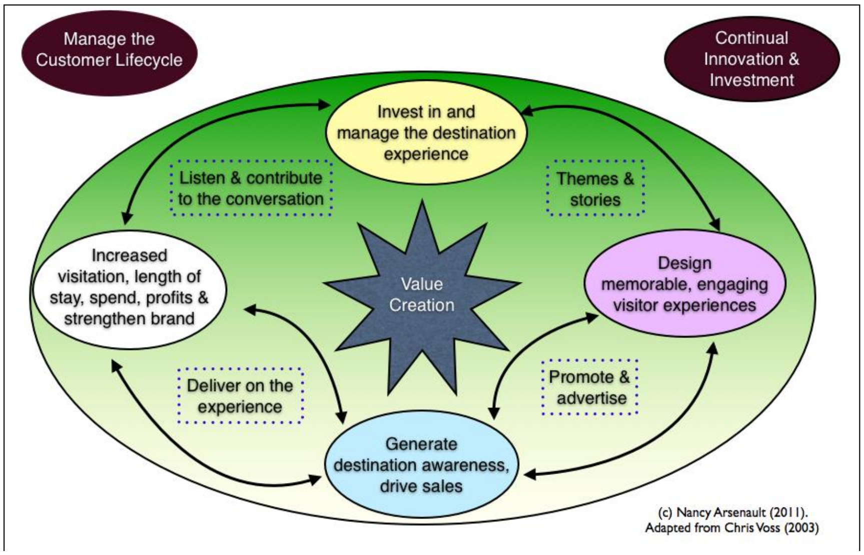
Specifically, the TDVAA examined five dimensions using qualitative and quantitative data:

1. **Reports**, plans and research documents, and projects-in-the-pipeline.
2. **Visitor profile information** and three 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 which included human resources, sales and marketing practices, environmental and social practices, strategic planning and investment.
5. **Measures of success** against which progress is measured and new variables are considered that would enrich understanding and decision-making.

Benefits of the Assessment

"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."[1]

Figure 1: The Tourism Experience Investment Cycle



The core benefit from the TDVAA is that it provides a consolidated review and key findings to guide the strategic direction for optimizing the tourism investment cycle (Figure 1) and the tactical investments for destination development.

In the NEA region, this is critical for tourism-based projects, but also the many regional development initiatives that benefit people, communities and visitors alike, such as strengthening inter-community collaboration with a visitor focus, continuing to invest in key experience development and targeted infrastructure products, raising the bar on the quality and services in the region and optimizing the online presence of businesses and municipalities. All of these initiatives will have an impact on tourism to a greater or lesser degree and have been considered in this NEA region TDVAA.

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

Key Findings

Fifteen aggregate key findings emerged from the analysis of the primary and secondary data sources (Chapter 4) and the iterative feedback process that ensured continual stakeholder input and validation through the 14-month process. Each key finding, detailed in Chapter 3, is supported by tactical actions that provide the foundation for operators, municipalities, DSJ, BTCRD, ACOA, HNL and others.

Finding #1: St. John's and the North East Avalon region is the iconic gateway to the province, yet the fragmented and ad hoc approach to tourism development is not helping optimize the region's true potential.

Finding #2: St. John's and its tourism partners are well positioned to initiate a long-term downtown stewardship strategy for the benefit of visitors and locals alike.

Finding #3: St. John's and its surrounding communities provide visitors with an ideal opportunity for 'hub and spoke' visitor experiences and activities.

Finding # 4: A renovated and revitalized George Street will provide the ideal visitor welcome to NL and the North East Avalon region.

Finding #5: The region's culture and heritage attractions have greater potential to attract visitors, especially outside of peak season.

Finding #6: Nature and activity-based businesses have the opportunity to augment their product offering with new experiences that respond to demands of the more discerning traveller.

Finding #7: Amplifying and celebrating the unique culinary and musical talent is a real opportunity to create a personal connection with visitors.

Finding #8: Future tourism growth will be optimized by continuing to leverage the high-yield tourism sectors.

Finding #9: There are fundamental service and transportation infrastructure gaps in the region's tourism offering.

Finding #10: There is untapped potential in the program- and people-based businesses that uniquely support the North East Avalon visitor experiences.

Finding #11: There are several projects in the pipeline that, if strategically acted on, will enhance overall visitor appeal and contribute to enhancing the region's attractiveness in peak and shoulder seasons.

Finding #12: The long-term sustainability of tourism in the region is fraught with human resource challenges particularly when it comes to attracting and retaining staff.

Finding #13: There is an opportunity to enhance operators' online presence and better leverage online tools including websites, TripAdvisor and Facebook to drive tourism visitation and revenues.

Finding #14: The province is making steady progress with enhancing the integration of the TDMS and e-dining databases to improve the marketing potential for businesses and visitors alike.

Finding #15: Partners of the Newfoundland and Labrador Tourism Board capitalized on industry feedback and insights from the Destination Development Plans to refresh the goals and objectives for *Vision 2020* to further align efforts to support industry growth through key, targeted initiatives.

Implementation

Implementation involves three phases and will look different depending on the specific recommendation and as various organizations become the champions for action. The first step is for tourism stakeholders to review the "Head Start Items' summarized in Chapter 5 that represent immediate short-term opportunities which can be advanced in the next six to nine months. This includes making presentations at community councils to engage them in learning about the plan and how they can support the short- and long-term development of tourism in the North East Avalon.

The second step is to put the recommendations through BTCRD's Opportunity Management (OM) process so that the NEA PSC, BTCRD, HNL, and ACOA, among other stakeholders can prioritize the projects together and within their individual organizations for budgeting and planning.

The third step involves forming stakeholder project task teams with individuals representing organizations that will benefit from the opportunity. Leadership will be provided by BTCRD, HNL and other organizations, with direct participation from the NEA PSC and the TDVAA Advisory Committee. An annual review by HNL, BTCRD, and the PSC will allow for year-to-year monitoring of the progress and adjusting to evolving realities as time passes and new learning during implementation occurs.

Source: Wikipedia; Coast of the Avalon Peninsula

Table of Contents

1. An Investment in the Future

In 2009, the tourism industry and province of Newfoundland and Labrador (NL) released their vision to double tourism revenues to $1.58B by 2020. Titled, *Uncommon Potential: A Vision for Newfoundland and Labrador Tourism (Vision 2020)* [2], this document has been a blueprint for growth in NL guided by seven strategic directions. Underpinning *Vision 2020* is respect for home, residents, travellers, communities and profitability. The vision for the future requires the collective will of many stakeholders collaborating to compete to achieving the desired outcomes. In March 2016, *Vision 2020* was refreshed with updated the goals and objectives to reflect the accomplishments since the original release date in 2009, as well as the continued challenges heading into 2020.

VISION STATEMENT

Newfoundland and Labrador will 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

The Newfoundland and Labrador (NL) brand stands for 'creativity' that is natural, spontaneous, and uncomplicated. It is an emotional brand 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]

As a gateway to the province the NEA region is an integral part of any NL experience. It presents tourism opportunities associated with the urban experience but affords travellers easy access to a rural NL experience, including charming coastal villages, sites and attractions.

Contributing to *Vision 2020*

One of the key strategic directions in *Vision 2020* is strategic direction #4, experience 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 share through photos, online messages, or private reflection. It is the sum of the visitors' emotional and physical connection to the North East Avalon region of Newfoundland that must be reflected in developing products and experiences that will generate new revenue for businesses and memorable value for guests.

The TDVAA process presents the opportunity to identify ways to increase travel to the more recognized areas, as well as the areas of the region that would like to see increased benefits from tourism. A primary goal of the process is to help operators and communities that have not realized their full tourism potential understand ways to enhance their offer and appeal and encourage operators to leverage their strengths beyond the traditional summer travel period in ways that:

- Resonate with travellers, reinforce the brand, and increase the return on investment;
- Continue to improve the visitor experience; and
- Allow operators to become more sustainable.

---

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

Purpose of the Project

The TDVAA responds to the Newfoundland and Labrador Tourism Board's (NL Tourism Board) interest in advancing strategic direction #4 of *Vision 2020*[4], which is focused on product and experience development.

HNL, BTCRD, NEA Primary Stakeholder Committee and ACOA, have engaged in a formative review process to assess the region's visitor appeal and identify gaps and opportunities, and ensure alignment for destination investment and development with all Tourism Board partners over the short- and long-term.

Brain Trust Marketing and Communications and the Tourism Cafe Canada were contracted to develop a customized assessment approach that engages the primary tourism stakeholder organizations in data collection and a process for engaging tourism stakeholders at multiple touch-points through this process.

Acknowledgements

The NEA region of NL is the fifth and final destination to complete the TDVAA process. Special thanks are given to the PSC, BTCRD, ACOA and HNL, plus the TDVAA Advisory Committee for their various roles in supporting data collection, analysis, hosting stakeholder meetings, reporting, ensuring local area insights are considered and facilitating stakeholder validation sessions.

Structure of the Report

Chapter 2 describes the TDVAA assessment framework and the conceptual framework that underpins the formative research methodology.

Chapter 3 presents the 15 key findings beginning with a statement of fact, based on the analysis of qualitative and quantitative information followed by a brief summary description of the finding, then a list of opportunities and recommendations. Items identified with a represent 'Head-Start Tactics' that can begin immediately while the remaining elements are prioritized through the BTCRD Opportunity Management (OM) process.

Chapter 4 provides detailed information that was gathered, and consolidated, as one of the major sources of information of the report. It begins with a Tourism Barometer to position the NEA region within the provincial, national and international context. The lengthy data insights begin with a high level summary of the key dimensions. This is followed by a discussion of each dimension, key findings, a series of bullets that extract highlights from the data, and includes related qualitative inputs from the stakeholder consultation and validation sessions. Finally, implications and considerations are provided and represent the research team's interpretation of the information based on analysis, team discussions and multiple touch-points with stakeholders.

Chapter 5 describes implementation, includes a brief synopsis of the BTCRD Opportunity Management (OM) process and provides a summary table of the Head-Start tactics.

Four appendices conclude the report: (1) Contributing Stakeholders, (2) Glossary of Terms, (3) Bibliography, (4) *Vision 2020* Alignment Summary.

---

4 Government of Newfoundland Labrador. (2009, February). Uncommon Potential: A Vision for Newfoundland and Labrador Tourism. Retrieved from http://hnl.ca/resources/vision-2020/

2. The Destination Assessment Framework

2.1 What is a Tourism Destination Visitor Appeal Assessment?

"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."[5]

The Tourism Destination Visitor Appeal Assessment (TDVAA) is designed to provide a foundation of knowledge about Newfoundland and Labrador's appeal at a regional level. Understanding the region's assets and attributes is vital to identifying priorities for investing in product and experience development that best delivers on the provincial brand promise.

The TDVAA is based on a formative assessment of a wide range of primary and secondary data sources and qualitative inputs from community stakeholder and online meetings, follow-up interviews, validation sessions, and a review of the preliminary findings. Emerging from this process are key findings, recommendations and opportunities (Chapter 3) that inform the NEA region's tourism industry where investment is needed to create and improve the visitor experience, enhance the competitiveness of the destination, and strengthen the capacity of tourism businesses.

Source: Destination St. John's

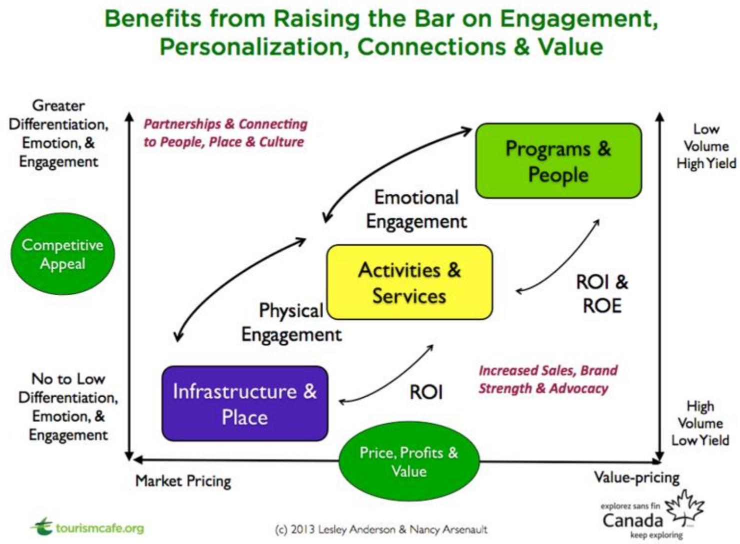
2.2 The Conceptual Framework Underpinning the Study

The ability to increase the benefits from the visitor economy for travellers and businesses alike can be enhanced by understanding how to raise the bar to generate value that strengthens the ability to

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

differentiate tourism products, create emotional connections and engage visitors with the special people, places, cultures and traditions in a destination (Figure 2).

Figure 2: Raising the Bar on Value to the Visitor



Travellers will typically engage with a variety of different companies when travelling depending on the purpose of their visit, length of stay and whom they are travelling with. The opportunity to enhance the visitor's journey by creating itineraries, based on different traveller types and typical travel paths, represents an important opportunity for the NEA region.

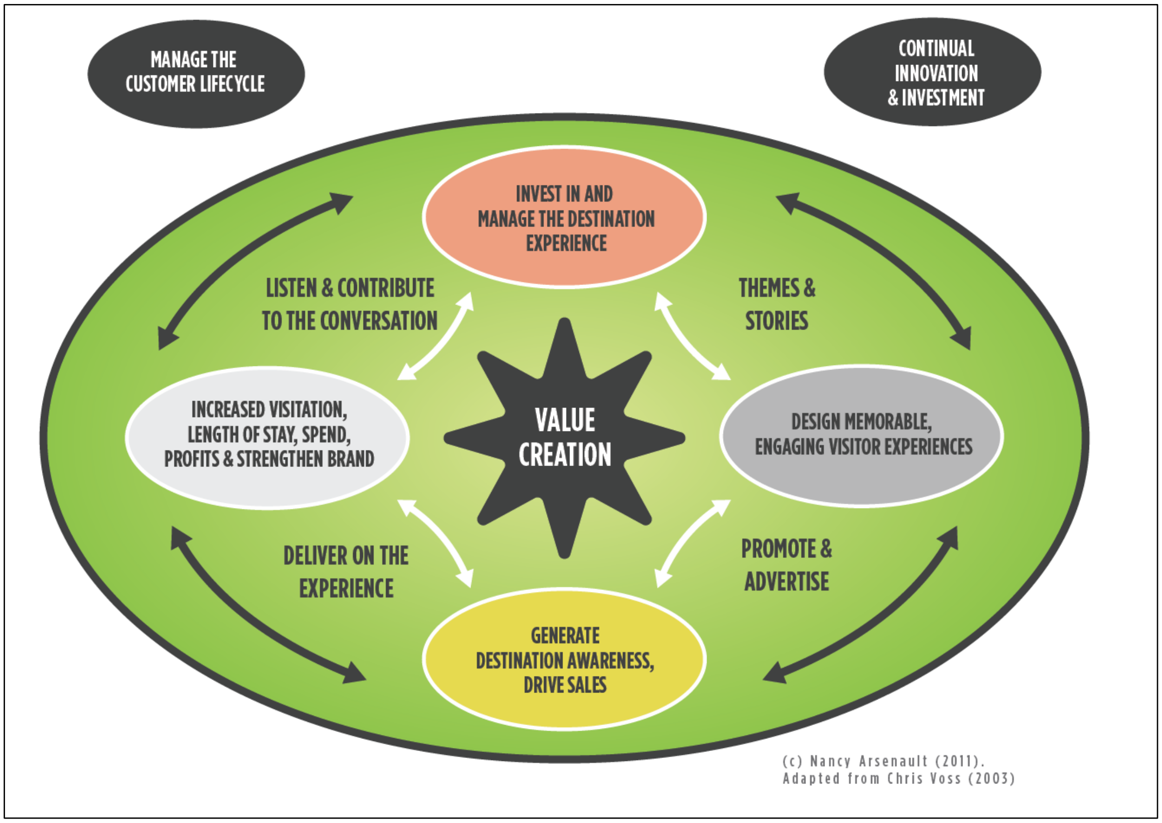
In the tourism industry, the businesses and organizations that support the visitor experience can be clustered into three categories; each having very different operating realities, but all important to travellers ability to holistically enjoy and engage with the special people, places and cultures that a destination, such as North East Avalon region of Newfoundland, has to offer.

- **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. Most operate year round, which requires carefully managing revenue and yield for high and slow seasons.
- **Activity-based businesses** have fixed costs related to a particular type of activity, but compared to the infrastructure category; the capital investment is much lower. They require steady volume and often cater to niche markets and smaller groups. Often some skill or equipment associated with the activity is required. Examples include whale watching or kayaking companies.
- **Program- and people-based businesses** have low or 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 be sustainable with low volume. Examples include guiding companies, storytellers, artisans, and musicians. The one exception is festivals that 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.

Benefits of Investing in this Assessment

The core benefit of investing in a TDVAA is to gain a consolidated understanding of the destination's potential to strengthen the visitor economy by ensuring the assets and attributes of the NEA region are aligned in ways that optimize the tourism experience investment cycle (Figure 3).

Figure 3: The Tourism Experience Investment Cycle



The visitor economy has a broader focus than that of the typical perception of a 'tourist'. Rather, 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. At the heart of value creation is value for the visitor, tourism businesses and the host communities.

Specifically, the benefits from this study include:

- An understanding of the 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 and experience 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;
- A synthesized database of critical tourism business data within the NEA region; and
- An engaged industry in the discussions, outcomes and implementation requirements for the study.

2.3 Methodology

The TDVAA uses a formative evaluation research methodology. Informed by both qualitative and quantitative data sources, preliminary findings emerge that are shared with stakeholders to gather their insights and feedback at multiple touch-points to ensure the research team 'has heard correctly and interpreted the data accurately' based on the information available. This allows for the nuances that are important to stakeholders to be added into the process that ultimately leads to an aggregate set of key findings followed by recommendations for action.

For the NEA region TDVAA the touch-points included:

1. Establishing a TDVAA Advisory Committee;
2. Hosting community and online presentations to inform industry stakeholders of the project;
3. Engaging the 3rd party data collectors (Telelink), contracted by the province;
4. Participating in on-going meetings with the TDVAA Advisory Committee, Regional Destination Project Leads, and Project Sponsors, complete with BTCRD and HNL team members keeping their organizations and boards appraised of the progress;
5. Consolidating and analyzing the data and reviewing preliminary findings first with PSC, HNL and BTCRD, then via presentations to the TDVAA Advisory Committee, government representatives, and in-community presentations with industry stakeholders;
6. Formulating the key findings, opportunities and recommendations, again securing detailed feedback and reflections from the PSC, BTCRD and HNL before presenting them to the TDVAA Advisory Committee and government representations via an online presentation;
7. Preparing a draft report for review and input; and
8. Finalizing the report.

Data Sources

Multiple data sources informed this report:

- 188 reports, plans and documents – see Appendix 3;
- Data from the Tourism Data Management System (TDMS) and Restaurant Association of Newfoundland Labrador (RANL) e-dining databases supplemented by additional variables;
- Five in-community industry stakeholder meetings to launch the project (March 1 and 2, 2015);
- Four in-community industry stakeholder meetings to validate the findings (January 13 and 14, 2016);
- Multiple one-on-one calls with individual representatives of the PSC;
- Considerable dialogue with DSJ and City of St. John's senior staff; and
- Multiple online meetings and presentations with the PSC, the TDVAA Advisory Committee, BTCRD, HNL, and ACOA.

The data was organized into five dimensions that, together, provide a holistic assessment (Table 1). A glossary of terms for the project is included in Appendix 2. Appendix 3 provides a bibliography of all secondary sources considered.

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 TripAdvisor 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.

2.4 Project Scope and Limitations

The scope of TDVAA is regional. It does not include a sub-regional analysis or focus on individual businesses or municipalities. Recommendations, actions and opportunities are aimed at the regional level, which when combined with the other four regions (Eastern, Labrador, Western and Central) will present an aggregate understanding at the provincial lens to complement the regional reports.

Implementing the recommendations will vary depending on the tourism operator or agency leading (e.g. NEA, HNL, BTCRD, ACOA, etc.).

The key limitations to the study include the:

- Ability of the third party primary data collectors (Telelink) to gather information from tourism businesses during seasonal fluctuations (high or low season);
- Degree to which the TDVAA advisory committee, industry and government stakeholders participate in the community industry stakeholder meetings, preliminary finding validation sessions and the review of the final recommendations to provide feedback, local area and governmental interpretation and validate the findings;
- Level of detail that could be examined with reports and documents given the unanticipated volume of documents relative to the time and budget for the project;
- The variables within the databases accessed that inform the study (TDMS and e-dining);
- Interpretation of what constitutes a ‘project in the pipeline’ relative to its being a community asset vs. an asset that drives visitation;
- Amount and type of data available regionally vs. provincially;
- 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; and
- Budget and human resources available.

2.5 Opportunity Management

Once the report is finalized, taking action on the short-term recommendations that impact individual businesses or organizations can occur. Larger projects that require multiple partners and funding agencies are reviewed using a customized Opportunity Management (OM) process to help set priorities and align stakeholders for action and implementation.

3. Key Findings & Recommendations

The North East Avalon (NEA) is the easternmost point in North America and includes the capital city of St. John's, Newfoundland and Labrador. It also encompasses many surrounding communities, including the City of Mount Pearl, the Towns of Torbay, Portugal Cove-St. Philips (PCSP), Paradise, Witless Bay, Petty Harbour and Conception Bay South. Together, these communities comprise approximately 55% of the province's population and are home to many tourist-related sites and attractions.

St. John's is at the heart of the Avalon, one of the oldest European settlements in North America. Its name is derived from the feast day of St. John the Baptist because it was on that day in 1497 that John Cabot sighted the New-Founde-Lande. Originally called St. John's Bay, this perfectly sheltered harbour drew explorers and fishermen here in the 1500s. The blend of English and Irish, New World and Old, encapsulates the city with a style and vitality that is as fresh as the breeze that always blows on Signal Hill, so named because the arrival of ships was announced from here to the town below through a series of flag signals. From the hill there is a spectacular view of the city, the harbour and the adjacent coastline of the Avalon Peninsula from this National Historic Site.

The downtown district sits on an active harbour that is accessed by Water Street, one of the oldest thoroughfares in North America. This winding downtown street has been the centre of commercial activity in the city for more than four hundred years and is still lined with a variety of interesting stores, restaurants and pubs. The restaurants feature traditional and international cuisine, while the pubs in St. John's offer musical entertainment that ranges from traditional Irish music to the latest country and rock. The city also serves as the primary tourist hub for the region and the province. The St. John's International Airport is the island's major airport serving approximately 1.5 million passengers annually. Approximately 70 per cent of all non-resident visitors who travel by air to and from the province do so through this airport. There are more than 50 roofed accommodation options available in the city available at a variety of price points, numerous restaurants and retail establishments to service guests.

The surrounding towns are easily accessible by car, or on foot if travelling along the picturesque East Coast Trail. They provide a wonderful opportunity for visitors to be introduced to Newfoundland's coastal communities and many must see sites and attractions within minutes of the downtown core. Guests can enjoy whale or iceberg watching, select one of several professional boat tours, or get up close to sea life in an escorted sea kayak trip. Attractions abound in the quaint coastal community of Petty Harbour, for example, which includes Fishing for Success; a dory fishing experience like none other. Guests learn how to row, hand-line for cod, fillet and cook the catch. In Conception Bay South, those guests who truly want a "Close Encounter" can snorkel with the whales and for those less adventurous, a "stay in the zodiac" option is available.

A variety of guided walks along the rugged coastlines and through quaint villages invite visits to several lighthouses. And the opportunities to enjoy a picnic lunch atop a seaside meadow with vistas of puffins and other seabirds swirling below are plentiful.

This is North East Avalon, a region rich in history, natural beauty and accessible coastal experiences.

Summary of the Key Findings

Stakeholder participation in the TDVAA has been strong and has generated important insights from diverse perspectives, at multiple touch points, during the 14-month process.

Fifteen aggregate key findings emerged for the NEA region based on a synthesis of various information sources including documents, reports, studies, stakeholder meetings and presentations (in community and online), and on-going input from the TDVAA Advisory Committee, the Primary Steering Committee, HNL, BTCRD and ACOA. The data and interpretation that formed the foundation for the analysis are presented in Chapter 4.

A "Key Finding" is written as a statement of fact designed to capture the essence of an important discovery. Based on the analysis of qualitative and quantitative information, each key finding statement is followed by a brief summary description of the finding, then a list of opportunities and recommendations. Opportunities and recommendations identified with a represent 'Head-Start Tactics' that can begin more immediately, while the remaining elements are prioritized through an Opportunity Management (OM) process. OM is a dynamic process that leads to tangible outcomes with on-going evaluation, from idea generation to initiative completion. It is a disciplined process that is realistic about the resources available and focuses on generating results over the short- and long-term. The OM process is iterative and will be continually monitored and revisited when considering destination development activities and initiatives for North East Avalon. A more complete description of the process is found in Chapter 5.

KEY FINDINGS

Finding #1: St. John's and the North East Avalon region is the iconic gateway to the province, yet the fragmented and ad hoc approach to tourism development is not helping optimize the region's true potential.

Finding #2: St. John's and its tourism partners are well positioned to initiate a long-term downtown stewardship strategy for the benefit of visitors and locals alike.

Finding #3: St. John's and its surrounding communities provide visitors with an ideal opportunity for 'hub and spoke' visitor experiences and activities.

Finding # 4: A renovated and revitalized George Street will provide the ideal visitor welcome to NL and the North East Avalon region.

Finding #5: The region's culture and heritage attractions have greater potential to attract visitors, especially outside of peak season.

Finding #6: Nature and activity-based businesses have the opportunity to augment their product offering with new experiences that respond to demands of the more discerning traveller.

Finding #7: Amplifying and celebrating the unique culinary and musical talent is a real opportunity to create a personal connection with visitors.

Finding #8: Future tourism growth will be optimized by continuing to leverage the high-yield tourism sectors.

Finding #9: There are fundamental service and transportation infrastructure gaps in the region's tourism offering.

Finding #10: There is untapped potential in the program- and people-based businesses that uniquely support the North East Avalon visitor experiences.

Finding #11: There are several projects in the pipeline that, if strategically acted on, will enhance overall visitor appeal and contribute to enhancing the region's attractiveness in peak and shoulder seasons.

Finding #12: The long-term sustainability of tourism in the region is fraught with human resource challenges particularly when it comes to attracting and retaining staff.

Finding #13: There is an opportunity to enhance operators' online presence and better leverage online tools including websites, TripAdvisor and Facebook to drive tourism visitation and revenues.

Finding #14: The province is making steady progress with enhancing the integration of the TDMS and e-dining databases to improve the marketing potential for businesses and visitors alike.

Finding #15: Partners of the Newfoundland and Labrador Tourism Board capitalized on industry feedback and insights from the Destination Development Plans to refresh the goals and objectives for *Vision 2020* to further align efforts to support industry growth through key, targeted initiatives.

FINDING #1: ST. JOHN'S AND THE NORTH EAST AVALON REGION IS THE ICONIC GATEWAY TO THE PROVINCE, YET THE FRAGMENTED AND AD HOC APPROACH TO TOURISM DEVELOPMENT IS NOT HELPING OPTIMIZE THE REGION'S TRUE POTENTIAL.

Rich with opportunity and a desire to get to the next level of competitiveness and appeal, the tourism industry in the NEA region must unite and identify a leadership group to implement the long-term plan to move the destination forward. With numerous successes already on the books and positive prospects on the horizon, there is reason to embrace a collaborative, cohesive and strategic tourism development process under the leadership of a single collaborative stakeholder group.

While DSJ takes responsibility for a number of tourism related activities, their primary role is tourism marketing and sales. The city of St. John's has also played a role in tourism, however with recent cutbacks to the municipal budget, tourism services once performed by the city have either been eliminated or reduced. Municipalities in the surrounding communities have relied for the most part on partnerships with DSJ to contribute to their tourism growth and potential.

The result is a leadership gap when it comes to driving long-range tourism planning and development within the NEA region.

Opportunities/Recommendations

1. **DSJ, BTCRD, HNL, City of St. John's, Tourism Business Leaders (St. John's and surrounding communities):** To fill the leadership void for long range tourism planning and development, business leaders in tourism along with senior staff from DSJ, the City of St. John's and BTCRD must come together and create a new committee whose sole responsibility will be to oversee the implementation of the NEA DDP. It is suggested this committee be known as the NEA DDP Working Committee (NEA WC).
2. **NEA DDP Working Committee (NEA WC):** Once established, work with HNL and BTCRD to facilitate the Opportunity Management (OM) process for the region in order to understand and prioritize the recommendations contained in the NEA DDP.

This recommendation supports goals 1.1, 1.2, 4.1 of *Vision 2020*.

FINDING #2: ST. JOHN'S AND ITS TOURISM PARTNERS ARE WELL POSITIONED TO INITIATE A LONG-TERM DOWNTOWN STEWARDSHIP STRATEGY FOR THE BENEFIT OF VISITORS AND LOCALS ALIKE.

The city of St. John's is an anchor tourism destination for the region and province. The key drivers are culture and heritage, culinary experiences, entertainment and festivals and events. Downtown St. John's, with its many restaurants, shops and galleries, hotels, the St. John's Convention Centre, the waterfront and view of the Narrows and Signal Hill, its architecture, the entertainment on George Street and the many little alleyss linking Duckworth Street, Water Street and the harbour front is at the core of a NEA visitor experience. Therefore, the municipality has a major role to play in ensuring that this primary tourism asset is effectively managed from a development perspective.

Recognizing that urban tourism is a primary economic generator for the region, the City of St. John's must assume a stewardship role for the development of its unique and popular downtown. Creating a tourism hub in the heart of the city would serve both visitors and tourism businesses. Good examples where municipal officials embraced tourism centric development can be found in cities like Ashville, North Carolina, Greenville and Charleston, South Carolina and Savannah, Georgia.

Consideration should be given to ensuring the creation of a vibrant, authentic, accessible and aesthetically pleasing downtown that showcases the oldest city in North America. The plan must encourage local business development and renovation of historical buildings. In addition, plans should incorporate improved visitor signage and way finding and identify locations for parking outside of the downtown core with additional public transportation options like expanded hop-on-hop-off trolley services and bike lanes.

Opportunities/Recommendations

1. **City of St. John's, NEA WC:** Given the considerable amount of infrastructure improvements planned or currently underway for the downtown core, there is opportunity to ensure these improvements will be done against the backdrop of not only what makes sense in addressing infrastructure deficiencies, but also in enhancing the visitors experience. Efforts must be made to enhance efficiency of city infrastructure but also incorporate functional and aesthetic enhancements that contribute to the visitor's experience. This includes incorporating enhancements that add to the ease for visitors to access tourism related businesses and services found in the city core.

2. **City of St. John's, DSJ, Downtown Business Association, Operators:** To ensure the importance of visitors to the downtown core is taken into consideration during discussions regarding downtown improvements, tourism organizations and operators who have a vested interest in seeing enhancements with the visitor in mind, must organize, participate and contribute to the planning process. Consider striking a Task Force whose mandate is to liaise with city staff to provide insight and input in relation to planned infrastructure improvements.

This recommendation supports goals 1.1, 4.2, 4.3 of *Vision 2020*.

FINDING #3: ST. JOHN'S AND ITS SURROUNDING COMMUNITIES PROVIDE VISITORS WITH AN IDEAL OPPORTUNITY FOR 'HUB AND SPOKE' VISITOR EXPERIENCES AND ACTIVITIES.

Ideally situated in the heart of the NEA region, St. John's has aptly been described and positioned as *urban on the edge of nature*. Blessed with a diverse inventory of things to see, the city is well suited as the perfect location and starting point for a variety of natural outdoor adventure opportunities. The surrounding communities, while lacking in tourism infrastructure like accommodations, provide guests with opportunities to hike magnificent coastal trails, sea kayak the rocky coastlines, view whales, icebergs and birds from one of many tour boats or shorelines, discover historic mines and lighthouses and interact with local people in a number of island and coastal communities. Guests have the best of both worlds at their fingertips for the NEA captures the breadth and depth of an authentic NL experience all within one region.

Operationally, DSJ, the tourism industry in St. John's, and the surrounding communities work well together. Most of the natural and outdoor adventure attractions and businesses are members of DSJ. Some of these operators are based in St. John's and sell their experiences there but deliver them beyond the boundaries of the city. Several operators provide transportation from the city to their attraction or experience. This makes the outdoor and natural attractions easily accessible for guests, while at the same time delivering business to a broad base of urban and rural tourism businesses.

There are some businesses in the surrounding communities that do not see themselves as part of the tourism industry but do in fact engage or have opportunities to engage with visitors and grow their business from this market. These include retailers, restaurateurs and special event venues.

The opportunity to enhance the working relationship between the economic development departments from the surrounding communities and DSJ could be strengthened by having a proactive, rather than reactive planning process to fully leverage the business opportunities from all market segments.

Opportunities/Recommendations

1. **DSJ, Economic Development Departments-Surrounding Communities:** Leverage DSJ's desire to proactively tap into the expertise available in the surrounding community's economic development departments by establishing an annual business building planning process that identifies strategies to enhance the overall competiveness and appeal of a St. John's hub and spoke selling proposition. This should be a forward-looking approach rather than reactionary based on the opportunities that come along. Growth opportunities will be sourced from each of DSJ's market segments (leisure, travel trade, MC&IT and sports events) and will

serve to enhance appeal by providing potential visitors with the best of NL in one region. When successful, this will extend length of stay and grow tourism revenues for the entire region.

2. **HNL, BTCRD, DSJ, Economic Development Departments and Operators in Surrounding Communities:** Increase the understanding of operators in the surrounding communities who, through tourism market readiness training, can contribute to creating richer and deeper visitor experiences that encourage travel between the city and the rural communities. Target training at businesses that have potential to enhance their product or experience offering to cater to identified visitor market segments thus growing their revenue from the visitor market. For example, equip the entertainers, musicians, story tellers and food and beverage providers located in the coastal communities to create new off-site (away from St. John's based hotels or the convention centre) programming or activities that could be included as part of the social program of DSJ MC&IT or targeted travel trade clients.
3. **BTCRD, HNL, DSJ, Economic Development Departments and Operators:** Create a series of purchasable experiences that connect St. John's based offers and infrastructure (attractions, historical sites, accommodations, F&B etc.) to the natural experiences, landscapes and trails found in and around the coastal communities like Petty Harbour, Bell Island, Bay Bulls and Manuels River. Consider positioning these experiences under an urban on the edge of nature theme which aligns with one of the five marketing pillars for Destination Canada.
4. **Petty Harbour, Bell Island:** These two quaint and unique locations located a short drive from St. John's must identify the types of visitors that will most enjoy what they have to offer. Developing strategies to market to these visitors in ways that builds on the appeal of the visitor experience currently in place will encourage more visitors to explore the sites beyond the city's border.

This recommendation supports goals 1.1, 2.2, 3.1, 4.3, 6.2, 7.1 of *Vision 2020*.

FINDING #4: A RENOVATED AND REVITALIZED GEORGE STREET WILL PROVIDE THE IDEAL VISITOR WELCOME TO NL AND THE NORTH EAST AVALON REGION.

The "heart beat of the city" is how the George Street Association (GSA) describes this iconic St. John's street. It has become a haunt for locals and a place all visitors to the city must experience. The street is populated with numerous restaurants and pubs, many that feature live music seven days a week. The street plays host to 10 days of music festivals and events that annually attract thousands of people. Over the years, George Street has gained national notoriety and become synonymous with the opportunity to have a good time and 'hang with the locals' while in Newfoundland and Labrador. The street also serves as a magnet to bring people into the downtown core where other businesses, including the many retailers benefit from their patronage.

In spite of its popularity, George Street has been plagued with a series of ongoing challenges. A 2007 study, refreshed in 2011 by the GSA identified the challenges, however, little has been done to address the issues. The studies pointed out concerns around safety, security, accessibility, aesthetics, signage, and general upkeep and maintenance. These remain evident today and if left unaddressed, the loss of appeal and diminished reputation of the street could have a long-term negative impact on businesses.

There is opportunity to grow the client or user base for George Street, especially from the visitor market segment. Not everyone wants to party to the wee hours of the morning or attend a mega music festival, therefore, by expanding the perception or changing of what a George Street experience represents, more people will visit and patronize the business in and around George Street during the day or early evening. For example, there are dining establishments on the street that are open for lunch and early dining that feature early evening live music, this experience may be appealing to certain traveller types.

In 2015, the GSA took a proactive step and released the *2016 George Street Association 10 Step Action Plan*. This plan identified a series of solutions to alleviate the issues and challenges mentioned above and put George Street back on a solid footing.

Opportunities/Recommendations

1. **City of St. John's, George Street Association, Operators:** Implement the recommendations identified in the 2016 George Street 10 Step Action Plan as soon as possible.
2. **City of St. John's, George Street Association, NEA WG:** Ensure George Street improvements are done in context of the long-term downtown visitor centric stewardship action plan.
3. **George Street Association, DSJ, BTCRD, Operators:** Building on the existing notoriety of George Street, expand that positioning by including imagery and language that presents a softer and more accessible George Street that is available during the day and early evening in order to attract business from new user groups.

This recommendation supports goals 4.2, 4.3 and 6.3 of *Vision 2020*.

FINDING #5: THE REGION'S CULTURE AND HERITAGE ATTRACTIONS HAVE GREATER POTENTIAL TO ATTRACT VISITORS, ESPECIALLY OUTSIDE OF PEAK SEASON.

With a long list of attractive and unique culture and heritage attractions such as The Rooms, Johnson Geo Centre, Petty Harbour Mini Aquarium and Manuels River Interpretation Centre, the region has an opportunity to better leverage these and other culture and heritage tourism assets to grow tourism visitation and revenues throughout the calendar year. While healthy levels of visitation are being achieved, none are at capacity, and all could benefit from attracting more guests during peak and off-peak season, as many are open year-round. By working more collaboratively with one another, with DSJ and the economic development and tourism staff in the surrounding communities, growing annual visitation should be achievable in the short-term.

Opportunities/Recommendations

1. **Operators:** Enhance current working relationships for the purpose of establishing a proactive approach for long-term collaboration and partnership to attract like visitors, cross promote, and develop compelling programming that complements one another's offering and fills the gaps during slower times of the year.
2. **Operators:** Explore creating a region-wide attractions pass that offers admission to a list of sites for one price similar to Canada's Capital Museum Passport[6] in Ottawa. Use best practices found in cities like Toronto[7], Chicago, London, Paris as well as the CityPass[8] network.
3. **Operators:** Work collaboratively to develop complementary programming at sites that are open in the winter months. Consider developing this programming with particular customer type and/or market segment in mind. For example, activities of interest to cultural explorers, meeting, conference and corporate visitors, sports tourism participants and spectators.
4. **Operators:** DSJ identified the need for more off site venues, which can seat more than 200 guests, for the MCIT market segment. Operators should evaluate their space to determine if, with some minor adjustments, they could accommodate receptions, small meetings or special events connected to conventions and conferences meeting at the St. John's Convention Centre (SJCC) or a hotel.
5. **City of St. John's, MetroBus, Operators:** Take steps to enhance the hop-on-hop-off bus that services select attractions within St. John's. Increase the number of locations and attractions along the route and the frequency in which it operates. Tie the bus service into the museum pass price structure.
6. **Operators, BTCRD, HNL:** Collaborate to deliver product development workshops to assist operators in identifying low or no cost options to enhance the visitor experience at each site.

---

6 https://www.ottawatourism.ca/ottawa-insider/canadas-capital-museums-passport/

7 http://www.citypass.com/toronto Many international cities use CityPass as their attractions ticket option.

8 https://www.parispass.com/?aid=270&gclid=CID_hJyftM0CFQdbfgodqWIPVA

Follow the lead of the Parks Canada by learning how to better leverage their existing built infrastructure to deliver more hands-on educational experiences that guests seek and are willing to pay more for. Creative programs such as the White Glove Tour[9] at Alexander Graham Bell National Historic Site or Time Travel at the Fortress of Louisbourg[10] are both prime examples of creative programming that received Canadian Signature Experience designation.

7. **BTCRD, City of St. John's, Operators:** Efforts to restore the Masonic Hall and Flake House should be a priority as any action in this regard will preserve these historic sites and provide new and enhanced programming and food service, as well as needed off-site meeting or special event space for the MC&IT market.
8. **DSJ, BTCRD:** Once operators enhance their experiences and make their sites more accessible (through the attractions pass for example), invest in new, themed, partnered promotional activities that reinforce the variety of unique heritage and cultural experiences that are available in the NEA region.

This recommendation supports goals 1.2, 2.1, 4.1, 4.3 and 6.3 of *Vision 2020*.

FINDING #6: NATURE AND ACTIVITY BASED BUSINESSES HAVE THE OPPORTUNITY TO AUGMENT THEIR PRODUCT OFFERING WITH NEW EXPERIENCES THAT RESPOND TO DEMANDS OF THE MORE DISCERNING TRAVELLER.

Known for spectacular landscapes and exciting natural encounters, there are numerous private and public-sector operators who use the natural backdrop of the NEA region to service visitors and they have an opportunity to layer on additional experiences to increase the diversity of the regional appeal.

Travellers today are drawn to unique, authentic and personalized experiences and while operators in the region have a reputation for delivering memorable experiences, enhancing the current offerings through creative experience development will ensure long-term sustainability for the operator and increased opportunities for guests. First time visitors to the region have a desire to see whales, icebergs and birds, as well as the coastal landscapes and communities and therefore most guests would delight in participating in what is currently available. However, there are emerging opportunities with discerning guests who want to go deeper, get off the beaten track, meet locals and have up close and personal experiences that go beyond what is currently available. Therefore, operators are encouraged to expand their offering to include enhanced experiences that are available at limited times and at premium prices.

Opportunities/Recommendations

1. **Operators, DSJ, HNL, BTCRD:** Operators evaluate current offering, sales performance and capacity to determine if there is an opportunity to grow revenue by adding enhanced experiences that cater to specific market segments at specific times of their operating hours. If so, work with DSJ, BTCRD and HNL and take steps to understand today's more discerning customer, then align their desires with new programming that once developed, utilizes their expertise, the expertise of others and enhanced access to or understanding of the natural assets they currently leverage. Utilize the BTCRD Creating Experiences Guide[11] to inform thinking.
2. **BTCRD, HNL:** Design and deliver experience enhancement / development webinars that cater to activity-based tourism operators. Access the expertise of the Bonavista Institute, the Gros Morne Institute for Sustainable Tourism and others to develop innovative curriculum. Use best practices of operators who have already responded to visitor demand and created unique experiences to augment their current offer. For example, the *Snorkeling with Humpback Whales*, Canadian

---

[9] http://www.historicplaces.ca/en/pages/65_white_gloves-gants_blancs.aspx
[10] http://www.pc.gc.ca/eng/voyage-travel/experiences/signature-experiences-distinctives.aspx
[11] http://www.btcrd.gov.nl.ca/Tourism/tourism_development/pdf/NLT2294_NL_toolkit.pdf

Signature Experience[12] offered by Ocean Quest Adventures or Stan Cooks' five-day *Legendary Whale Wonders.*[13]

3. **Hiking Outfitters, Interpretive Guides:** Expand current experiences offered to align with the demands of new emerging market segments such as women only travellers, active seniors, foodies and novice nature lovers. Create programming that utilizes the trail networks found in the region as the backdrop for interpretive hiking programs that include food, music, and educational components.

This recommendation supports goals 4.1, 4.3 and 5.1 of *Vision 2020*.

FINDING #7: AMPLIFYING AND CELEBRATING THE UNIQUE CULINARY AND MUSICAL TALENT IS A REAL OPPORTUNITY TO CREATE A PERSONAL CONNECTION WITH VISITORS.

The combination of good food, local talent and a warm and friendly atmosphere is a wonderful combination for creating memorable visitor experiences. The NEA region, and St. John's, in particular, is renowned for dishing up these kind of memorable experiences everyday yet there is greater potential to be realized. The emerging culinary talent found in a new breed of chefs is leading the way. Many new and thriving restaurants have come on the scene offering guests a variety of local culinary options not seen before. There is also an abundance of home grown musical and comedic talent that are seeking stages to perform on. The power of these ingredients coming together in enhanced ways to further add to the appeal of the region is within easy reach. Further utilizing these home grown resources can only help to further position the NEA region as a vibrant destination for the leisure, sports or MC&IT markets. Gaining inspiration from companies like Island Joy Rides on Vancouver Island[14] who offer Biking with a Chef and Chocolate Foodies tours by bike could expand the ways to pair cycling and culinary adventures in St. Johns and around the region.

Opportunities / Recommendations:

1. **Operators, HNL, Music NL, RANL:** Together, establish a vision that strives to identify ways to better leverage the demand for, and availability of, a combination of the wonderful food and beverage options available and the outstanding musical and comedic talent present in the NEA region. Inventory the emerging restaurants and pubs (those offering unique, home grown food and beverage options) and the list of local home grown musical and comedic talent. Create opportunities for these two groups to come together in order to create new food and entertainment experiences delivered at restaurants, pubs, bars and clubs throught the region.
2. **DSJ, BTCRD:** Enhance the promotion of the NEA region's local brand of emerging culinary and entertainment options through new and existing media channels including travel media.
3. **Music NL, RANL, HNL:** Establish an annual awards programme, or add a category to an existing programme, that recognizes those operators and entertainers that demonstrate creative collaboration in order to present visitors and locals alike with an expanded list of culinary and entertainment options.

This recommendation supports goals 1.1, 4.3 and 6.1 of *Vision 2020*.

FINDING #8: FUTURE TOURISM GROWTH WILL BE OPTIMIZED BY CONTINUING TO LEVERAGE HIGH-YIELD TOURISM SECTORS.

The region has enjoyed the highest hotel sector performance in NL for the last five consecutive years. While performance slowed in 2015 with the weakening economy associated with reduced business from the oil, gas and mining sectors, industry leaders are optimistic occupancy will rebound within two to three

[12] http://www.oceanquestadventures.com/tours-packages/close-encounters/snorkelingwithwhales/
[13] http://caen-keepexploring.canada.travel/things-to-do/exp/legendary-whale-wonders-stan-cook-sea-kayak-adventures#/?galleryItemId=200010440
[14] http://www.islandjoyrides.com/bike-tours/day-trips

years. Future tourism growth will be optimized by continuing to focus on leveraging high-yield market sectors including: Meetings, Conventions and Incentive Travel (MCIT), Sport Tourism and Leisure Travel - Group Tour and FIT. Collaboration will be critical if the tourism industry wants to maintain business during the downturn. Taking proactive steps to fully understand market dynamics and respond with business strategies that optimize performance will be essential.

Opportunities/Recommendations

1. **Operators:** Against the backdrop of changing market dynamics, operators must look at their businesses and the experiences, products and services they offer to ensure they are meeting the needs of all segments of the NEA region's visitor market. Each market segment has different needs; therefore, presenting the same experiences, products and services to each segment limits opportunities to close the sale both at the individual business and destination level. Operators are encouraged to work with DSJ, BTCRD, Sport Tourism Event Partnership (STEP) and other government agencies to understand the nuance of each segment especially before making new investments in product development, marketing and sales. This will ensure an alignment with market needs and wants, as well as with development efforts of the broader region.
2. **Accommodators:** Recruiting and retaining experienced sellers is critical to meeting the ever increasing demands and expectations of professional meeting planners, event managers and group tour operators. Third party meeting planners, in particular, demand fast turn arounds on requests for proposals and expect comprehensive, professional and client centered responses. As DSJ works on behalf of all accommodators and serves as the sales representative for all market segments and client groups, their success will be greatly enhanced if they can present potential buyers (leads) with compelling, competitive and timely sales proposals. Accommodators must take steps to improve the response time and quality of their proposals.
3. DSJ, Attractions, Heritage / Culture Sites, Activity Based Operators: As DSJ uses creative sales and promotional tactics to expand into its shoulder seasons for the MCIT, sport and leisure travel markets, operators providing experiences and services (attractions, historic sites, museums, VICs, performance centres, transportation providers) for these market segments must expand their season as well.
4. **DSJ, HNL, BTCRD:** To enhance sales effectiveness in the near and long-term, destination developers and marketers would be well served to deliver training designed to help operators understand changing market dynamics and how to be more effective at meeting the needs of today's travellers. Training should incorporate experience and product development, business collaboration techniques and effective proposal writing, among other things.
5. **Destination Management Companies (DMC), Activity-Based Operators:** An increasing number of professional meeting planners, event managers and group tour operators seek out and value the professional services offered by receptive operators and DMC within the destination to assist with theming, event planning and ground logistics. They also look for unique experiences offered by traditional (tour boat operators and historic sites) and non-traditional (theatre companies, musicians) activity-based businesses that go beyond what is available to the average tourist. Therefore, presenting these potential customers with competitive bids that offer creative and relevant elements that are in sync with the NL brand is important to overall destination success. Operators are encouraged to review their current offerings and consider re-tooling or updating them so they are fresh, relevant, unique and entertaining.
6. **Attractions, Traditional / Non-Traditional Event Venues:** There is high demand for off-site venues that can seat 200+ people for a sit down meal. Venues for stand-up receptions are also in demand. Group planners like to take their guests outside the host hotel or convention centre for at least one evening to experience and enjoy coastal views, interesting architecture, sheltered harbours or green spaces. There are a number of potential new venues in the pipeline for restoration and renovation including the Masonic Temple, the former Battery Hotel, the former Flake House in Quidi Vidi, the Farmers Market and the Colonial Building. These and other venues could meet this demand if the restorations incorporate certain design and function elements required by meeting and group planners. Operators should consult DSJ before renovation or restoration takes place in order to ensure design elements are aligned with increased sales

opportunities from high demand tourism markets.

7. **NEA Working Group:** There are a number of impediments that are holding the NEA region back; the NEA WC, working with partners, must take steps to understand the issues and then create timely and logical processes to remove identified barriers in order to seize business growth opportunities. Opportunities include:
    - **a.** Creating a proactive and stable bid support process for major conferences and sporting events;
    - **b.** Enhancing capacity (knowledge, resources and time) of local sports organizations and provincial sport organizations to positively affect ability to bid on and host sporting events;
    - **c.** Enhancing support infrastructure and sport and event facilities that meet minimum standards for hosting national and international events. The existing facilities are aging and lack modern amenities. NL will host the 2025 Canada Summer Games; this will provide an opportunity to invest strategically in sport infrastructure for the future;
    - **d.** Introducing year-round streetscape maintenance and cleaning (expand beyond May – Sept) in downtown St. John's as visitors are walking the streets and seeing the sites every month of the year; and
    - **e.** Expanding the greening practices with tourism operators.

This recommendation supports goals 1.2, 3.1, 4.2, 4.3, 6.3 and 7.2 of *Vision 2020*.

FINDING #9: THERE ARE FUNDAMENTAL SERVICE AND TRANSPORTATION INFRASTRUCTURE GAPS IN THE REGION'S TOURISM OFFERING.

Tourism is growing at a record pace in destinations around the world and future projections suggest that this trend will continue. To ride this wave of prosperity, the NEA region must take proactive steps to enhance the fundamental tourism service and transportation infrastructure throughout the entire region. With increased air lift into St. John's, Deer Lake and Gander, getting to NL from off-island is not an issue. However, once guests arrive in the NEA region by air they can be faced with a number of challenges that inconvenience or frustrate them, turning what could have been a memorable experience, one they would tell their family and friends about, into disappointment.

Opportunities/Recommendations

1. City of St. John's, Taxi Operators / Ground Transportation Companies, Rental Car Companies, MetroBus, St. John's International Airport: Take steps to continue the pleasant environment guests experience when they deplane their aircraft to outside the doors of the arrivals area. Address deficiencies such as inconsistent or non-existent public ground transportation options, rental car pick-up and drop-off areas, taxi availability during peak arrival times and late evening as well as taxi cleanliness, condition and availability of vehicle rentals during peak season.
2. **City of St. John's:** Take steps to evaluate ways to enhance visitor signage and way finding in and around the downtown core. Use best practices from other urban areas as examples of what helpful visitor signage looks like. For example, Legible London http://content.tfl.gov.uk/ll-yellow-book.pdf and Walk Philadelphia http://www.centercityphila.org/docs/directionphila_infosheet.pdf
3. **City of St. John's, MetroBus, Attractions:** Expand the hop-on-hop-off attraction shuttle bus service offered during peak season by adding more frequency and site locations
4. **City of St. John's, NEA WC:** Implement strategies that address service shortfalls for cruise ship arrival welcome, VIC hours of operation and FAM program facilitation among other things.
5. **Surrounding Communities, MetroBus, Ground Transportation / Shuttle Bus Companies:** Create a forum that fosters dialogue to identify solutions to enhance transportation options available to guests who do not have their own vehicle and want to travel outside of St. John's to experience the people, sites and attractions found in surrounding communities.
6. **NL Department of Transportation and Works:** To meet the needs of visitors and maximize

their time touring the region, enhance the Portugal Cove and Bell Island ferry schedule to provide all day service without the customary one hour plus lunch break.

This recommendation supports goals 2.1, 2.2, 4.3 and 6.3 of *Vision 2020*.

FINDING #10: THERE IS UNTAPPED POTENTIAL IN THE PROGRAM- AND PEOPLE-BASED BUSINESSES THAT UNIQUELY SUPPORT THE NORTH EAST AVALON VISITOR EXPERIENCE.

The true personality of a tourism destination comes alive through the personal encounters with the people that deliver a variety of authentic, memorable and engaging experiences. These include the interpretive guides, musicians, story tellers, artisans and individuals who volunteer at local festivals and events found in a destination. Highly personal encounters add a rich dimension to a visit, ones that guests will pay for; therefore, it is important for the tourism industry to draw on these valuable resources. The people often share their talent for little or no remuneration. According to reliable industry sources during the data collection phase of this study, many individuals were identified who “fit the bill” but capitalizing on opportunities to leverage their talent and expertise is not being realized.

Opportunities/Recommendations

1. **NEA WG, DSJ, Surrounding Communities:** Create an inventory of individuals who may be active in delivering a variety of authentic experiences to guests. Mine data bases managed by the Craft Council of NL, NL Arts Council, Music NL among others to identify individuals who are or could be offering authentic personal experiences.
2. **DSJ, Surrounding Communities, HNL, BTCRD:** Develop and deliver tourism orientation training for program- and people-based individuals that helps them understand ways to become a key fabric of a visitor’s experience and earn income at the same time by either developing their own delivery channels or by partnering with other tourism operators who will build their experiences into a larger guest offer.
3. **DSJ, Surrounding Communities:** Consider a special campaign to profile the diverse and unique collection of talented individuals found in the region in visitor communications. Create opportunities for these individuals to meet guests during FAM trips, travel media interviews, conventions and welcomes at opening functions etc.

This recommendation supports goals 4.3, 6.2 and 7.2 of *Vision 2020*.

FINDING #11: THERE ARE SEVERAL PROJECTS IN THE PIPELINE THAT IF STRATEGICALLY ACTED ON, WILL ENHANCE OVERALL VISITOR APPEAL AND CONTRIBUTE TO ENHANCING THE REGION'S ATTRACTIVENESS IN PEAK AND SHOULDER SEASONS.

A diverse list of projects in the pipeline revealed that communities throughout the NEA region are interested in increasing their tourism potential through expanding the capacity of their existing tourism assets. Strategically advancing these projects will increase the diversity of the region's appeal, create new reasons to visit and encourage longer stays and repeat visitation. Ensuring development priorities are placed on projects that target different types of visitors will optimize the reach and diversity available to operators in the NEA region. Additionally, these projects will create new tourism demand generators that in turn encourages new and repeat visitation as guests discover multiple reasons to travel throughout the region and to the city of St. John's.

Opportunities/Recommendations

1. **BTCRD, ACOA, HNL, NEA WG and Operators:** Prioritize, through the OM process, projects that have the greatest potential to attract non-resident travellers with strong consideration to those that will drive visitation to St. John's, as well as the surrounding communities. In addition, give priority to projects that reinforce the regions "urban on the edge of nature" positioning. Take into consideration the wants and needs of the diverse market segments that currently visit the region.

This recommendation supports goals 4.1 of *Vision 2020*.

FINDING #12: THE LONG-TERM SUSTAINABILITY OF TOURISM IN THE REGION IS FRAUGHT WITH HUMAN RESOURCE CHALLENGES PARTICULARLY WHEN IT COMES TO ATTRACTING AND RETAINING STAFF.

The tourism industry from coast to coast to coast is experiencing a variety of labour challenges and it is anticipated the situation will only worsen in the future. This is the case for the NEA region. Challenges, particularly in the accommodation, retail and food and beverage (F&B) sectors, are affecting day to day operations as employers have difficulty attracting and retaining suitable front line and back of the house staff. It has been referred to as a "revolving door" situation where service staff move from one operator to another primarily motivated by a slight increase in wages. There are a number of training or equipping resources that operators and employees can avail of and this goes a long way to enhancing the labour pool.

Opportunities / Recommendations:

1. **HNL, Operators:** Exploring how to entice older workers to consider tourism as a semi-retirement/retired work option especially in the accommodations, retail and F&B sectors is important as they are active, experienced and good workers with a strong work ethic, yet they have different needs and motivations for working in later life. The *Targeted Older Workers Initiative*[15] is a program that could reach and engage the semi-retired, retiring baby-boomer population that could be a real asset to the tourism industry.

This recommendation supports goals 7.1 of *Vision 2020*.

---

[15] Government of Newfoundland & Labrador Advanced Education and Skills. (2014). *Targeted initiative for older workers. Request for proposals.* A government funding program to support NL's unemployed older workers.

Finding #13: There is an opportunity to enhance online presence and better leverage online tools including operator websites, TripAdvisor and Facebook to drive tourism visitation and revenues.

The NEA region has the best online presence compared to the other four regions in the province. Yet, the percentage of tourism businesses with websites, a TripAdvisor presence and Facebook account varies greatly throughout the NEA region.

Eleven percent of the tourism assets do not have a website and, while not a significant number (11), the web is where the majority of travellers go to plan their trip and make reservations. Operators with a website need to optimize this channel and ensure that what is available matches expectations and interests of visitors. Additionally, operators could increase the benefits from TripAdvisor and Facebook if they responded to guest comments to more proactively create a two-way online conversation.

Opportunities / Recommendations:

1. **DSJ, Surrounding Communities, HNL:** Extract from the TDVAA database the tourism businesses without a website, TripAdvisor page and/or Facebook account and invite them to invest in enhancing the reach of their business by using these distribution channels. DMO's could take the lead on connecting with businesses to explain the importance of this missed opportunity relative to why visitors use these sites as part of their trip planning and decision making process. HNL could develop three targeted one-day workshops that take an operator from a state of non-engagement, to understanding the relevance, how to invest, level of effort required to maintain a presence, conversation protocols expected by consumers, how to use these marketing tools. For TripAdvisor and Facebook specifically, operators should leave the workshop having created a basic web presence and learned the protocols and visitor expectations for each channel. The training must go beyond relevance and benefits and include 'hands-on keyboard' learning/doing. The Working Group can use the baseline data from the TDVAA to monitor uptake and improvements over the next two to three years.
2. **Operators**: For businesses with a website, add experience descriptions, videos and photos of visitors engaged in activities that show potential visitors the type of experience they can anticipate. Ensure a call to action for direct sales is evident, and if working with the travel trade and/or travel media or would like to attract this type of interest, ensure information and a call to action is included on specific landing pages. Investigate online reservation systems, ensuring there is "how to get here" information.
3. **Operators, Surrounding Communities, DSJ:** Invest in high-definition images that convey emotion and the physical connection to people and places. Where excellent regional videos or images are produced by other organizations and available online, DSJ could assist operators by sending the links so they may add these to their online sites.
4. **Surrounding Communities:** Building a 'tourism website' is not recommended, for this is not the core business of a municipality. Effort should be made however, to ensure there is a 'visit us' or 'visitors' landing page with links to the provincial tourism website and tourism businesses in the specific community as well as DSJ.

This recommendation supports goals 5.1, 6.2, 6.37.2 of *Vision 2020*.

Finding #14: The province is making steady progress with enhancing the integration of the TDMS and e-dining databases to improve the marketing potential for businesses and visitors alike.

The Tourism Destination Management System (TDMS) is a sophisticated tool that allows tourism operators to annually input information about their business. The system translates this information into online marketing opportunities and provides the province and visitors with important information.

Principally designed to capture information relevant to consumers, TDMS is also a source of business-to-business insight for product partnering, packaging, and the travel media and travel trade. Operators are encouraged to raise the bar with experiences that command a higher price point - access to experience providers (program-based operators/individuals) that can provide their 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. This is a finding that has been noted in the four Destination Development Plans completed to date (Eastern, Labrador, Western, Central) given its growing importance in diversifying the visitor experience, providing local area people to program and package with, and assisting the visitor connect with local people in ways that are relevant to their interests.

At the heart, future enhancements have the potential to explore a shift from a controlled approach, whereby the province is the only organization to monitor the quality and currency of the TDMS, to a defined, designated role by the regional DMO's who are closer to the stakeholders and can contribute to ensuring the accuracy of data provided. Ultimately, ensuring visitor access to current, real time accurate information will be an opportunity for the future.

Opportunity/Recommendations

1. **Operators:** BTCRD and RANL are in discussions to have food and beverage operators complete a Tourism Operator Profile form to become part of the provincial tourism marketing system. DSJ and surrounding communities can be instrumental in ensuring operators are aware of the opportunity when it is introduced and ensure everyone signs up. Operators will need to complete the forms ensuring the declarations they make on the form (e.g. regarding vegetarian, vegan, gluten etc.) are honest and will reflect what a visitor can enjoy at their establishment.

This recommendation supports goals 3.1and 6.3 of *Vision 2020*.

FINDING #15: PARTNERS OF THE NEWFOUNDLAND AND LABRADOR TOURISM BOARD HAVE CAPITALIZED ON INDUSTRY FEEDBACK AND INSIGHTS FROM THE DESTINATION DEVELOPMENT PROGRAM TO REFRESH THE GOALS AND OBJECTIVES FOR VISION 2020 TO FURTHER ALIGN EFFORTS TO SUPPORT INDUSTRY GROWTH THROUGH KEY, TARGETED INITIATIVES.

In 2015, six years after the launch of the *Vision* in 2009, the Newfoundland and Labrador Tourism Board embarked on a process to update, refresh and renew the goals and objectives contained with the strategy. The renewed strategy reflects the accomplishments achieved, as well as the challenges remaining, placing focus on what the priorities must be heading into the home stretch towards 2020.

With four years remaining until 2020, the timing to do this could not have been better. When the *Vision* was developed throughout 2008 and 2009, research combined with industry wide consultation informed each of the seven strategic directions and each of the goals and objectives within. This combination of data and industry input also served as the foundation for the *Vision* renewal and was enabled by partner collaboration.

In 2015, the Tourism Board completed a second Milestone Evaluation that outlines collective partner progress towards the achievement of the *Vision*. That assessment enabled qualitative and quantitative measures to be discussed as a means of informing how to tackle the remaining challenges. While such information is critically important, it could not be considered in isolation of industry input. As such, an important part of the renewal process was to ensure that industry's voice was reflected. Destination Development provided a timely opportunity for just that.

The Destination Development process was launched in 2013 and as of March 31, 2016, five regional reports will be completed and come together to inform the provincial product development strategy. Heavily dependent upon industry contribution, the Destination Development process created an opportunity for almost 50 in-person sessions with operators and industry contributors throughout the province. Conversations spanned everything tourism and the feedback was phenomenal, helping shape not only the Destination Development reports, but the view of tourism in general.

The seven strategic directions of the renewed *Vision* remain the same; however, the goals and objectives within the *Vision* are more pointed towards strategic tourism investment to ensure a sustainable future for the industry. The *Vision* provides our renewed plan so that together as partners, the tourism industry reaches the ultimate goal of: *doubling tourism spending by 2020 by attracting more visitors, getting them to stay longer and providing opportunities for them to experience more.*

Opportunity/Recommendations

1. **NL Tourism Board Partners:** Ongoing discussions about the alignment of partners and stakeholders within the tourism industry will be critically important to achieving the goals and objectives outlined within *Vision 2020*. NL Tourism Board partners should consider how to engage stakeholders outside the Tourism Board in discussions about how to best contribute to the overall goals and objectives of the *Vision.*
2. **NL Tourism Industry Stakeholders:** The tourism industry in Newfoundland and Labrador has a great many stakeholders from private, public and not-for-profit sectors. All stakeholders should consider their role as it relates to tourism and how they can contribute to the overall goals and objectives of *Vision 2020.* By connecting with NL Tourism Board partners, stakeholders can further their understanding of how the work they are doing can be supported by activities and initiatives linked to the achievement of the *Vision*.

This recommendation supports 1.1 and 1.2 of *Vision 2020*.

4. Informing the Findings

The North East Avalon Peninsula is the primary gateway to the Province of Newfoundland and Labrador. A region rich in history and natural beauty, there is an abundance of unique things to see and do. Tourism has long been a primary economic driver for the region and investments in built and natural tourism infrastructure has contributed to the region's success as the leading tourism destination in the province. The region has enjoyed healthy levels of tourism visitation for the past several years and, without question, the NL brand has contributed to this success.

The region has a good mix of tourism infrastructure. There is an international airport, substantial commercial roofed accommodations, built attractions, national and provincial historical sites, an abundance of restaurants and pubs, a collection of unique retail establishment including art galleries and studios and a long list of annual festivals and events. Recent expansion of the St. John's Convention Centre will go a long way to contribute to the number of international, national, provincial and regional meetings, conferences and conventions. This, along with recent success at attracting international and national sporting events, will all contribute to solid tourism performance.

The region attracts a variety of traveller types from a number of core travel market segments including traditional leisure travelers, meeting, convention and conference delegates and sports event participants and spectators. Because of the makeup of these market segments, travel takes place year-round. Leisure travel takes place primarily May to September, MC&IT business occurs April to November with emphasis May/June and September/October and sports related tourism happens year-round.

4.1 The Tourism Barometer

More than ever, tourism is an economic driver and a source of full-time and seasonal jobs. It provides support to governments at all levels through tax revenues generated, which can then be reinvested into infrastructure, health care, education, research, and social service programs among other things.

One of the fastest growing industries in the world, the demand for travel continues to increase and the competition for visitors is fierce, particularly from emerging destinations, some of which are increasing at a rate 13% per year.[16]

Long-term projections to 2030 see emerging economies garnering 57% of international arrivals (up from 30% in 1980) and advanced economies (which includes Canada) securing 43% of the market. The United Nations World Tourism Organization (UNWTO) reports that global international tourism arrivals (overnight visitors) reached a total of 1,184 million in 2015, 50 million more than in 2014 (+4.4%). 2015 marked the 6th consecutive year of above average growth following the 2009 global economic crisis.[17]

Nationally, tourism activity generated $88.5 billion in revenues in 2014 and Canada's tourism sector accounted for $34.4 billion in Gross Domestic Product. The sector employed more than 627,000 people in over 170,000 businesses.[18]

In 2015, the total international arrivals to Canada increased by 7.5% over 2014, well above the global growth rate of 4.4% recorded in 2014. From January to December 2015, arrivals from Destination Canada's (DC's) 11 markets (10 overseas markets + the US) registered a 7.9% gain compared to 2014 amid gains from all four world regions, including the US (+8.3%), Asia- Pacific (+7.7%), Latin America (+13.3%) and Europe (+4.0%). It is worth noting that arrival growth was recorded in all eleven DC markets during 2015. France, Australia, China, India and Brazil registered their highest level of visitation to Canada ever during 2015.[19]

From January to December 2015, the national occupancy rate rose (+1 point to 64%) compared with the previous year. During the same period, the national average daily rate rose to $144, up 5.1% compared to 2014. In 2015, Revenue per Available Room (RevPAR) was $91 (+3.4%).[20]

The USA remains Canada's best international market accounting for 19% of total US outbound visitation. Twelve states consistently generate more than 70% of Canada's total US overnight visitation and 67% of all US visitor spending within Canada. Only four of those states (Michigan, Minnesota, New York and Washington) are border-states, debunking the myth that most US travel is of the short-stay, low-spend variety.[21]

A strong year in terms of visitation, 2015 was, in fact, the best since the financial crisis of 2008 to 2009. In 2015, the number of US overnight visitors rose 8.3% compared to 2014 to reach nearly 12.5 million. Strong growth registered across all transport modes including by automobile (+9.9%), air (+6.4%) and other modes (+4.8%).[22]

NEWFOUNDLAND & LABRADOR

Provincially, Newfoundland and Labrador received approximately 503,000 non-resident visitors from January 1 to December 31, 2015, representing a slight decrease of 1% over 2014. Associated expenditures are estimated to have reached $492.8 million, on par with 2014.[23]

---

16 World Tourism Organization (2013). *UNWTO Tourism Highlights, 2013 Edition.* (pg. 2).
17 World Tourism Organization (2016). UWTO World Tourism Barometer, Vol. 14, March 2016
18 Canadian Tourism Commission, Statistics Canada, International Travel Survey, Tourism Snapshot, 2014.
19 Destination Canada, Tourism Snapshot, December 2015.
20 Hotel Association of Canada, Hotel Industry Fact Sheet. Feb. 2016.
21 Tourism Industry Association of Canada. (2014) Gateway to Growth: Canadian Tourism Industry Annual Report.
22 Destination Canada, Tourism Snapshot, December 2015
23 Government of Newfoundland Labrador (2016, Mar.) *Year-End Provincial Tourism Performance 2015.* Document provided by the NL Department of Business, Tourism, Culture and Rural Development.

A 5% decline in airline passengers at St. John's International Airport had an impact on provincial performance. Declines are attributed to a combination of factors: a reduction in private charter flights to Alberta as well as scheduled commercial traffic due to reduced oil prices and reduced oil production; the closure of the St. John's Convention Centre in 2015 resulting in a decrease of 15% in meetings and convention business; and the cancellation of flights and disruption for passengers resulting from poor weather conditions combined with airport construction during the installation of a new navigational system on the main runway at the airport. Conversely, Deer Lake and Gander airports saw record passenger movements. Non-resident air travel, which represents the largest segment of NL tourism market, declined by 1% in 2015 to an estimated 385,100 visitors. Expenditures for non-resident air visitors are estimated to have reached $399.1 million, on par with 2014.

"Inbound non-stop seat capacity is a major indicator of the state of air access to the province. The significant increase in inbound seat capacity (up 11%) in 2014 was followed by a more modest 2% increase (21,774 additional seats) in 2015. The increase is driven by the international sector, which added over 20,000 new non-stop seats in 2015: both Air Canada and WestJet added capacity to their overseas services between St. John's and Heathrow and Dublin, respectively. Air Transat also launched a new seasonal service between Gander and Gatwick last year."[24]

Auto visitation and expenditures by non-residents increased by 4.0% and 4.5% respectively in 2015. All Canadian markets contributed to this growth: Maritimes +2.1%, Ontario +11.2%, Quebec +1.4% and other Canada +5.3%.

There were 21,600 unique cruise visitors to the province in 2015 representing a decrease of 19.6%. Spending also declined to $1.9 million, a decrease of 20.8% compared to 2014.[25]

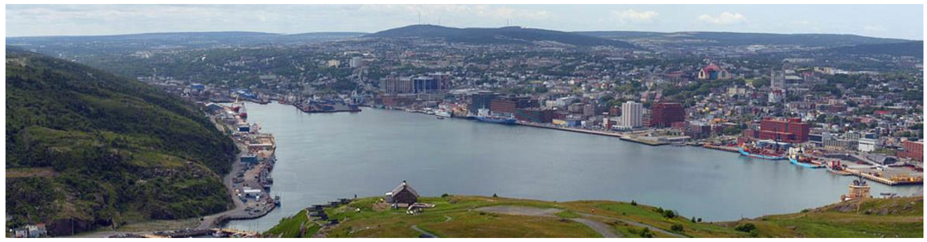
In terms of accommodations, performance of roofed accommodation decreased slightly during 2015. Occupancy rates on a provincial level reached 50.8%, a decrease of 0.3 percentage points over 2014's 51.0%.[26] Performance increased in all regions except the Avalon Peninsula; Eastern (0.6 points), Western (3.2 points), Central (3.7 points) and Labrador (0.4%). The Avalon saw occupancy rates drop by 4.8 points in 2015. Provincially, average daily room rates were up 1.8% to $135. At 8.0%, the Central region recorded the highest increase in average daily rates from 2014 to 2015 ($121 to $131) compared to other regions. There were rate increases in the other regions; Eastern (5.3%), Western (3.3%), Labrador (4.7%), however, rates decreased 0.6% in the Avalon.[27]

Marine Atlantic reversed a five-year negative performance trend by increasing passenger movements between Newfoundland and Nova Scotia by 3.9% to 319,213 passenger movements in 2015. Gains are attributed to decreased gasoline prices and a decrease in overall ferry rates due to lower fuel consumption.[28]

---

[24] The Economy. (March 30, 2016). Published annually by the Government of Newfoundland and Labrador, Dept. of Finance and Treasury Board.
[25] Ibid. p. 2.
[26] Occupancy rate: This is the total number of rooms/units sold divided by the total number of rooms/units available during the reporting period. It represents the utilization rate of the sample reporting at time of publication. Occupancy levels are subject to revision pending further reporting by the province's accommodation operators.
[27] Government of Newfoundland Labrador (2016, Mar.) *Year-End Provincial Tourism Performance 2015, March.* Document provided by the NL Department of Business, Tourism, Culture and Rural Development.
[28] Ibid. p 4.

St. John's



During the period from 2010-2014, the St. John's economy continued to perform well, with gross domestic product growth of just over 3%, retail sales growth of more than 30%, and employment growth of over 6%. In 2015, however, the economic picture in St. John's changed. Global economic uncertainty created by declining oil prices has had an impact across the country. "Real GDP growth in St. John's in 2015 is forecasted at just 0.3%, with little or no growth anticipated in the labour force. The unemployment rate is forecasted to increase by 1.2 points in 2015, and retails sales are expected to remain flat."[29]

2016 Tourism Outlook[30]

Non-resident pleasure travel to the province should benefit from lower fuel costs and a significantly weaker Canadian dollar, which acts as an incentive for American tourists and also makes vacationing within Canada more attractive for Canadians.

• As of March 2016, 74 tentative port calls to 23 ports around the province are anticipated for the 2016 cruise season. More are expected as cruise lines release their itineraries.

• The St. John's Convention Centre's official re-opening is scheduled for May 2016 and Destination St. John's is expecting a successful season, with bookings 12% ahead of the 2015 booking pace (as of February 2016).

• Modest air passenger growth is expected for 2016, facilitated by the completion of primary runway work at St. John's International Airport, an increase in convention/meetings activity (with the re-opening of the Convention Centre in May) and a low Canadian dollar encouraging an increase in both domestic and American travelers.

Summary

In Newfoundland and Labrador, over $100 million has been invested in provincial marketing since 2006. The Find Yourself Here Campaign has garnered 227+ awards since 2006 and created strong brand awareness for the province.[31] This has contributed to increased demand for NL's tourism offering and contributed to moving non-resident travellers along a path to purchase. An appealing brand invitation can be supported by having tourism products and experiences in market that exceed guest expectations. Continued investment in tourism experience and product development is essential in order to fulfill the brand promise. It also contributes to extending the length of stay and repeat visitation.

The talent gap continues to be a major challenge facing the tourism industry in Newfoundland and Labrador[32] and across Canada.[33] [34] As demand for tourism increases, availability of skilled labour decreases, so the region could struggle in realizing its full potential into the future.

Coping strategies to avoid the negative impacts from labour realities will include reduced hours of operation, shortened operating seasons, sharing staff, or partial room operations for hotels.

---

[29] City of St. John's, Roadmap 2021, 3 Year Review, October 2015,

[30] The Economy. (March 30, 2016). Published annually by the Government of Newfoundland and Labrador, Dept. of Finance and Treasury Board.

[31] Government of Newfoundland and Labrador, Department of Business, Tourism, Culture and Rural Development, Dec. 2014

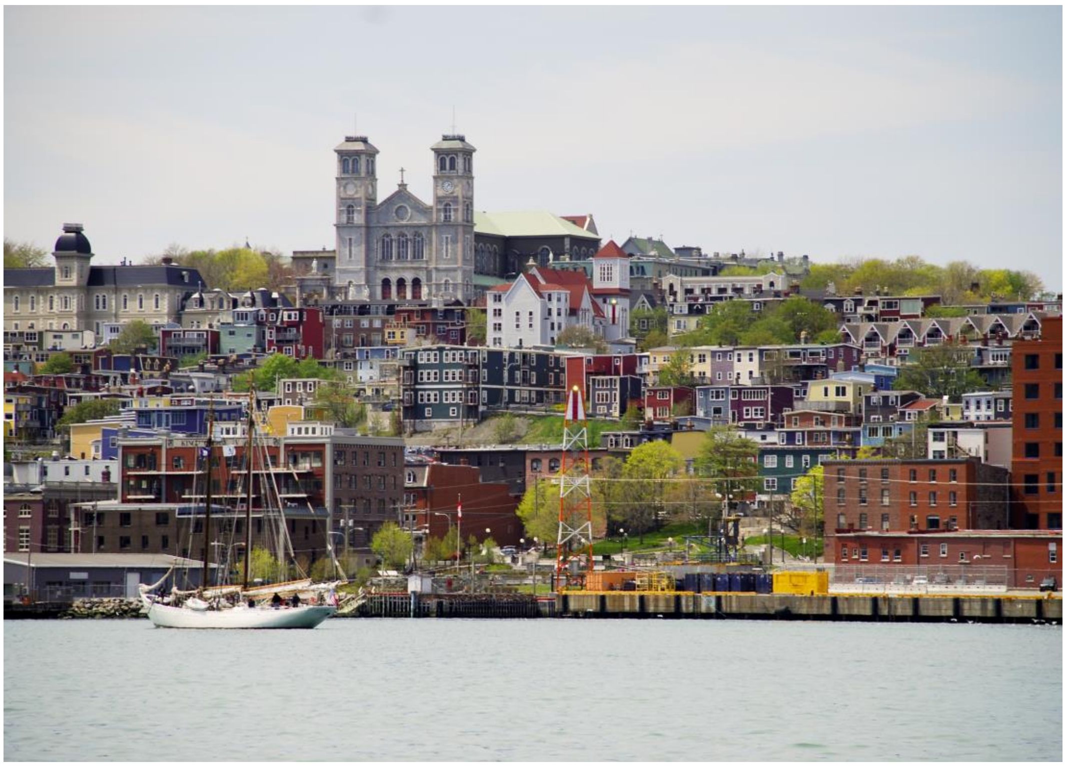
[32] Canadian Tourism Human Resource Council. (2012, Mar.). *Attracting and Retaining Tourism Talent: Current Labour Issues and Future Challenges.* A power point presentation for the HNL Board of Directors Meeting March 23, 2012.

[33] Deloitte 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

[34] 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

Newfoundland and Labrador is internationally renowned for its people and hospitality and will have to innovate wisely, consider new staffing business models and consider hiring mature workers as part of a refocused investment to ensure the actual experience lived by the traveller matches the perception that is in marketplace and promoted by the provincial marketing campaigns.

Hospitality Newfoundland and Labrador (HNL) is well positioned to advocate for targeted investment in product and market development and human resource support for the tourism industry. As a partner on the NL Tourism Board, this advocacy role will be important in working towards implementing the provincial strategic plan, *Uncommon Potential: A Vision for Newfoundland and Labrador Tourism (Vision 2020).*



4.2 Data Insights

ASSESSING THE NORTH EAST AVALON REGION'S VISITOR APPEAL

There are five dimensions to the TDVAA (Table 1). It is important to note that the categorization is not absolute; rather it is based on a review of the data, discussion with regional stakeholders and the sum of conclusions reached.

Each dimension first presents the summary statement, followed by data tables, key findings about the facts, and finally, the implications and considerations. Upon review of the data the project team determines if the region is doing very well in an area, and if so, a green indicator is given. This implies, continue to do what you are doing; there may not be a need for new investment. A yellow signifies some evidence of positive results, but targeted investment is needed. A red indicator means this is a weak area and requires a specific focus. These of course have to be considered within the overall strategic priorities of the province and the region.

Together, the facts and figures in Chapter 4 are reviewed, along with qualitative stakeholder feedback, information from key documents, targeted interviews, and numerous team meetings to present the key findings, opportunities and recommendations that are located in Chapter 3.

Table 2: High Level Summary of the Key Assessment 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 & exit surveys	VP3 Produces satisfaction & exit surveys		X	
Customer Engagement	Website and social media links	CE1 Municipal websites with essential info	X		
		CE2 Destination websites with essential info	X		
		CE3 Tourism Operators with essential info	X		
	TripAdvisor	CE4 Municipalities with TripAdvisor accounts			X
		CE5 Destination with TripAdvisor accounts	X		
		CE6 Tourism Operators with TripAdvisor accounts		X	
	Facebook	CE7 Municipalities with Facebook Accounts		X	
		CE8 Destination with Facebook Accounts	X		
		CE9 Tourism Operators with Facebook Accounts	X		

3. Product and Market Dimensions				Yes	Almost	No
	Infrastructure Based Companies					
Assets & Attributes	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 amenities for watercraft travellers	X		
	Visitor Info 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	IB4	Culture and heritage assets at varying price	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)	X		
		IB6.3	Variety of walking trails	X		
	Man Made	IB.7	Man-made attractions at various price points	X		
	Shopping/Retail	IB.8	Shopping and retail at various 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 Tourism Assets & Outfitters					
		AB1	Offers a range of activities to engage visitors	X		
		AB2	Flexibility/choice for length, interaction, price	X		
		AB3	Tour operators that package & sell domestically	X		
		AB4	Tour operators that package & sell internationally	X		
	People/Program Based Companies					
		PB1	Has a range of experiential program providers	X		
		PB2	Hosts a number of festivals & special events	X		
		PB3	Festivals & special events that are offered on a regular basis	X		
	Demand Generators					
		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 five years		X	
		HR5	Evidence of tourism business succession 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 five-years, capital has been invested in infrastructure renewal/expansion	X		
		SPI5	In past five-years, capital has been invested in product & experience development	X		
		SPI6	The majority of tourism businesses (private & not-for-profit) 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	BTCRD, Telelink, HNL, and support from 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]

A total of 188 documents were captured in the secondary data review for the NEA region. While each document offers any number of specific recommendations impacting the regions tourism prospects, the purpose of this review was to capture those specifically relevant to the NEA region, plus examine the provincial, national and international relevance.

The following documents were reviewed:

- Eight International documents
- 59 National documents
- 92 Provincial documents
- 29 Community/Business/Regional documents

The scope of the documents reviewed included:

- Business plans and special project plans
- 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)
- North East Avalon market information
- Activity profiles (e.g. hiking, skiing, snowmobiling, fishing, hunting etc.)
- Resource inventories, and
- Trends

As well, there were multiple ferry, airline and cruise schedules reviewed plus data tables from the Tourism Destination Management System (TDMS) that are not catalogued in Appendix 3 but were part of the materials used and reviewed.

Projects in the Pipeline are defined as major tourism projects that are in the concept or development stage, application for funding stage, or approval stage that will bring a valuable provincial, regional or community contribution to tourism. Requests were made for information on any projects within the past five years (2010 - 2014). Table 3 lists a sample of projects identified as offering future tourism potential for NEA. The full listing of Projects in the Pipeline is located in Appendix 2.

Table 3: Projects in the Pipeline Offering the Greatest Tourism Potential

Project Identification, Area or Organization	Brief Description
Petty Harbour	Master Plan for Tourism (developing linkages to the East Coast Trail and trail improvements around Petty Harbour area). Fishing for Success, Island Rooms of Petty Harbour. Working with DFO for a small cod quota that can be used to teach children to fish, clean the fish and prepare the fish. To make it sustainable they want to have fee based experiences for the traveller. North Atlantic Zip Line – making a new tourism centric product with trail and glamping site. New aquarium plan in the works at the Mini Aquarium.
East Coast Trail Inc.	Hiker Survey and Economic Impact Analysis is now completed. Project currently underway to implement five key initiatives around signage, parking and road pull-offs, fundraising, trail mapping and marketing including web site redesign. Seven key initiatives outlined in the original proposal, two are not part of the current project: trail enhancement and trail development. It is expected that they will be seeking financial assistance in the future to implement these two initiatives.
Bell Island	Interpretation Plan / Miner's Museum. Lighthouse Keepers Home – Planning further experience based development activity. Landings restaurant and retail space - Owner of fish plant building to support new ferry terminal.
Conception Bay South	Main Street District Harbour Plaza (Manuels) - Pier and boardwalk to create a formalized public space for concerts, dining, finger piers – have ACOA money for concept plan, waiting for provincial $ - anticipated completion in 3-5 years. Further development of the Trail way – Phase III announced – an additional 4.1 kms to be completed by March 2017 with a gateway trail connection to a retail / arena complex. ATV Bypass Route – A project the Town has been working towards for several years, just completed construction of the first staging area at Indian Pond in the west end of Town. Manuels River Natural Heritage Society Inc. – Development of Manuels River Trails Master Plan.
Witless Bay	Bring East Coast Trail tourists to the community – signage/interpretation (part of East Coast Trail initiative as well). Town of Witless Bay looking at implementing further initiatives around tourism related enhancements within the community including an Eco Centre focusing on the Witless Bay Ecological Reserve, community trails and interpretive panels.
Mount Pearl	Tri-partite agreement between Mount Pearl, St. John's and Paradise regarding development of Waterford River area.
Town of Torbay	Tourism Gateway Sites – seeking funding currently for three sites in Torbay. One at main gateway to the Town on St. John's border, two at Torbay beach. Sharitage Project; a heritage signage initiative. Five sites around Torbay already functioning. Phase II includes additional five sites to be installed in 2016. Economic Development Plan – Several tourism initiatives to be implemented in 2016/17. Purchase of Priest's House for new museum, funded internally to purchase.
St. John's	Water Street Redevelopment project (water, sewage etc.) – infrastructure requirements needed so city staff are going through a envisioning project to inform beatification of public space options, working with DSJ, retailers, etc.

	O'Brien's Farm Foundation – Plan for a heritage, education and tourism experience – working farm (Late 19th century) – Discussions ongoing, the organization has some planning done. This project got a recent lift with a donor stepping forward. Masonic Temple Revitalization - To protect the building against further erosion keeping it preserved for years to come and to expand capacity on the 2nd floor, the Masonic Restoration Project has been launched. In 2008, The Masonic Temple became home to Spirit of Newfoundland, one of Newfoundland and Labrador's longest running musical theatre companies. This group has committed to restoring it with a multi-faceted plan to raise $750,000 - $1.0 million in capital in order to accommodate more group business in addition to its dinner theatre performances. George Street Association 10 Step Action Plan – Introduced in 2015 this plan details the primary areas where attention is required to improve the appeal of George Street. The hope is that the Association and the City of St. John's and others can come together to implement the plan in 2016.
Quidi Vidi Village	Old Village Flake House – RFP issued to preserve this building. Potential for a new off-site meetings/events venue at this site. Also a second phase development study is being considered for development of the village including parking. Plantation Building - Project to expand/enhance the first floor to make the space more reflected of the village history, seeking private/public partnership.
Torbay / Portugal Cove	Killick Coast Scenic Drive – working together to develop this route, website that features tourism sites etc. on the route, working on this in 2016, trying to bring in other communities on the route. This is the first of what hopes to be many coop projects, facilitated by the province's Urban Accord – 20 Mayors/Communities in the province. Urban / rural partnership at the heart of this.
Portugal Cove-St. Philips	Blast Hole Ponds Bike Park – 50 acre of mountain biking trails, a potential location for Canada Summer Games in 2025, ties into the trail network within the community. Goal to create a bike route from airport to the trail system, (early days). Mountain Bike Association involved. Rainbow Gulley – Expansion to soccer and rugby fields to provide the only fields of this nature in the region – sports tourism opportunity, hiring new staff person to prepare bids.

Key Findings

- There is a wide range of documents informing the tourism context for the region;
- Both operators and DMO expressed concern about using visitor information from a 2011 survey;
- Projects in the pipeline include a long list of potentially viable opportunities to enhance the attractiveness and tourism infrastructure of the region;
- With limited visitor attractions in the surrounding communities, there are opportunities to enhance the attractiveness of these communities through many of the identified projects;
- There is a good mix of natural outdoor projects (trails) and built attraction/site projects (museums, historic and interpretive sites).

Implications/Considerations

- Details of the projects in the pipeline should be evaluated and prioritized based on their ability to increase visitor appeal of the region and to generate new business, support should be directed to those projects that hold the most promise and deliver the greatest return on emotion (ROE) for visitors and return on investment (ROI) for operators.

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: 3rd Party Contractor, BTCRD, HNL, NEA Working Group
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: 3rd Party Contractor

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

VP2 The destination has a depth of psychographic information on traveller motivations. [ALMOST]

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

Customer Research

- The province gathers a wide range of demographic information for a number of variables such as visitation, roofed accommodations, camping, airport passenger movement, room night sales, non-resident demographics, per-party spend, etc. This information leads from a provincial perspective, and where the sample size is sufficient, a regional segmentation is available.
- There is psychographic information, specifically on visitors to the NEA region, to help create a visitor profile for operators. BTCRD conducted the Non-resident Travel Attitudes and Motivation study in Nov 2013. Findings from the Non-resident Travel Attitudes and Motivations study help fill part of the psychographic informational gap.
- Exit surveys and key reports are published on a regular schedule; a new visitor study will be implemented in 2016.

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 aspect of the TDVAA examined the degree to which the businesses, municipalities and regional destination marketing sites are present in three key areas: Website, TripAdvisor and Facebook. Specifically, through a visitor lens, the research determined if these organizations were easily found online and the level of engagement and conversation occurring with current, past or potential visitors.

CE1 The destination has municipal websites that provide essential visitor information. [YES]

CE2 The destination has destination websites that provide essential visitor information. [YES]

CE3 The destination has tourism business websites that provide essential visitor information. [YES]

CE4 Municipalities have TripAdvisor accounts. [NO].

CE5 Destination organizations have TripAdvisor accounts. [YES]

CE6 Tourism operators have TripAdvisor accounts. [ALMOST]

CE7 The municipalities have Facebook accounts. [ALMOST].

CE8 The destination organizations have Facebook accounts. [YES]

CE9 Tourism operators have Facebook accounts. [YES]

Table 4: Municipal & Destination Website Summary

Website Summary	**Municipalities**		**Destination Websites ***	
	Number in Northeast Avalon Region	% of total with Websites	Number in North East Avalon Region	% of total with Websites
Total number of towns/cities in the region	14	100%		
Total number of websites in region (incorporated and unincorporated) with a basic tourism section	14	100%		
Total number of websites promoting the destination	0	-	2	100%
Of those 14 municipal and 2 destination websites that have tourism information the following was observed				
Have visitor testimonials posted on their website	0	-	0	-
Post photos of visitors engaged in the activity/experience	0	-	2	100%
Post photos of the location or infrastructure	8	57%	2	100%
Post tourism related videos of visitors engaged in the experience	0	-	1	50%
Post videos of the location or infrastructure	0	-	1	50%
Have a tourism booking call to action on websites	0	-	1	50%
Have ‘how to get here’ visitor information on website	10	71%	2	100%
Accept phone/email reservations for tourism booking	1	7%	0	-
Accept online reservations for tourism bookings	0	-	0	-
Sign up for a tourism e-newsletter sign up option	2	14%	2	100%
Have a contact page for the travel trade	1	7%	1	50%
Have a destination/city/town tourism blog	0	-	0	-
Have a link referring guests to their TripAdvisor Account	0	-	0	-

* Destinations websites include Destination St. John’s and Bell Island Tourism. All other communities have municipal websites.

Table 5: Tourism Operators Online Summary Activity

Total Assets by Sector	**Number of Assets**	**Percentage With websites**	**Percentage with Trip Advisor**	**Percentage with Facebook**
RV & Campgrounds	4	75%	-	0%
Roofed Accommodations	73	93%	71%	60%
Culture and Heritage Based Assets	74	74%	42%	53%
Nature Based Assets	27	96%	46%	59%
Trails and Routes	34	97%	76%	59%
Man-Made Attractions	11	100%	73%	100%
Activity Based Business	31	94%	45%	52%
Program Based Assets	7	86%	33%	86%
Festivals and Events	68	90%	8%	68%

Table 6: Tourism Operator's Select Website Information

F. Website Information																
Business Sector	Number of Businesses	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 website	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	4	3	0	2	3	2	0	1	3	2	3	3	1	0	0	1
Roofed Accommodations	73	68	25	9	66	6	4	15	59	65	49	57	6	24	3	13
Culture and Heritage Based Assets	74	55	0	18	44	19	9	8	40	22	4	13	25	1	5	2
Nature Based Assets	27	26	2	12	15	11	3	4	12	5	2	6	4	4	0	3
Trails and Routes	31	33	14	24	26	24	4	21	28	3	3	3	15	14	0	2
Man-Made Attractions	11	11	2	10	8	6	5	4	9	9	4	8	3	1	0	3
Activity Based Businesses	31	29	13	15	20	11	6	11	15	27	6	19	2	0	5	6
Program Based Businesses	7	6	1	2	4	4	0	0	3	4	0	4	0	1	1	0
Festivals and Events	68	61	3	26	25	25	8	7	28	30	8	17	20	6	6	0
Totals	326	292	60	118	211	108	39	71	197	167	79	130	76	51	20	30
Percentage*		89%	21%	40%	72%	37%	13%	24%	67%	57%	27%	45%	26%	17%	7%	10%
*Of those with a website																

Table 7: Municipal & Destination TripAdvisor Summary

% are of those with a TripAdvisor Account	Municipalities		Destinations	
	Number	% of total	Number	% of total
# with a TripAdvisor page (DMO's don't have an account)	0	-	2	100%
# of Hotels/Accommodations listed	0	-	92	-
# Restaurants	0	-	15	-
# Attractions/Things to Do	0	-	12	-
Never respond with a comment to guests (1/0)	0	-	0	-
Never respond with a comment to guests (1/0)	0	-	0	-
Respond to a guest reviews <50% of the time (1/0)	0	-	0	-
Respond to a guest reviews >50% of the time (1/0)	0	-	0	-

Table 8 : Municipal & Destination Facebook Summary

% are of those with a Facebook Account	Municipalities		Destinations	
	Number	% of total	Number	% of total
# with a Facebook Account	6	43%	2	100%
# of likes	18,537		6,133	-
#of people talking	804		1,261	-
# Visitors were here	8,577		15	-
Link to their trip advisor account	0	-	0	-
Link to google map	3	50%	2	100%
Have a link referring guests to their YouTube account	0	-	1	50%
Have direct links to company's sales pages	0	-	0	-
Have a booking engine	0	-	0	-
Accept credit card payments	0	-	0	-

Table 9: Tourism Operator TripAdvisor Presence

G. Trip Advisor										
Business Sector	Number of Businesses	Account (1/0)	Number of reviews	Number of visitor photos	Professional Photos (1/0)	Range of Ratings 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 Facebook page
RV & Campgrounds	There is no category for RV/Campgrounds in TripAdvisor so this was not evaluated									
Roofed Accommodations	73	48	6513	1168	44	3.5-5	34	106	25	1
Culture and Heritage Based Assets	74	23	3202	970	5	3-4.5	19	18	2	0
Nature Based Assets	27	12	1304	479	0	3.5-5	10	14	10	1
Trails and Routes	31	25	3616	1474	0	3.0 - 5.0	21	11	2	11
Man-Made Attractions	11	8	394	150	4	3.0 - 5.0	4	15	7	1
Activity Based Businesses	31	13	916	675	7	4.5-5	9	5	13	0
Program Based Businesses	7	2	120	5	3	4.5	1	1	1	0
Festivals and Events	68	5	582	121	3	4-4.5	4	1	1	0
Totals	325	136	16,647	5,042	66	3.0-5.0	102	171	61	14
Percentage *		41%			49%		75%		45%	10%
* Of those with a TripAdvisor account										

Table 10: Tourism Operator Facebook Presence

H. Business Facebook													
Business 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	4	0	0	0	0	0	0	0	0	0	0	0	0
Roofed Accommodations	73	44	32908	136	46057	106	6	31	15	12	30	3	10
Culture and Heritage Based Assets	74	39	55849	3099	15177	263	3	25	28	8	33	16	4
Nature Based Assets	27	16	17012	5104	11972	115	1	9	12	2	13	7	0
Trails and Routes	34	20	43677	0	6395	145	1	19	20	4	20	18	4
Man-Made Attractions	11	11	17675	622	9412	144	1	8	9	6	11	9	2
Activity Based Businesses	31	16	20056	371	3930	37	5	14	5	5	15	11	1
Program Based Businesses	7	6	4806	19	26	0	0	3	5	0	6	3	0
Festivals and Events	68	46	84679	3740	15790	329	0	22	35	3	43	23	5
Totals	329	198	276,662	13,091	108,759	1,139	17	131	129	40	171	90	26
Percentage *							9%	70%	69%	22%	92%	48 %	14%
* Of those with a Facebook account													

Key Findings for Municipalities/Destinations

- 14 of 14 municipalities (100%) in the NEA region have a website. All offer basic tourism information:
    - 57% post photos of infrastructure, none post photos of visitors engaged in the activity/experience, none post videos
    - 71% offer how to get here information
- Both DMO's have a TripAdvisor page but not a formal account;
- The City of St. John's website contains a significant amount of visitor information under their "Visiting Our City" tab;
- Destination St. John's has opted NOT to have a TripAdvisor account as they determined they were not in a position to respond to guest reviews for individual properties/operators. They do, however, encourage their members to have an account and provide training to help operators get an account;
- No municipalities are represented on TripAdvisor with an account;
- Six municipalities have a Facebook account (43%), 50% have a link to a Google map;
- Portugal Cove-St. Philips new municipal website launched in 2016, hiring a communications person, and;
- Mount Pearl has a new municipal website, new staff resource being hired.

Implications/Considerations for Municipalities/Destinations

Municipalities that have a website could enhance their tourism pages by:

- Providing relevant local area information about their community;
- Ensuring a link to the provincial and DSJ website is easily found;
- Linking user generated photos, videos, and testimonials to bring the landing page to life, and;
- Providing hyperlinks to tourism businesses in their community.
- The City of St. John's should provide an easily accessible link to the provincial and DSJ websites.

Key Findings for Operators

- 89% of the 329 tourism assets identified have a website. This is higher than the Central region (67%), Eastern region (67%), Labrador region (62%) and Western region (80%);
- The percentage of businesses with websites is high across all segments of the industry with the exception of cultural attractions where 26% of the 74 businesses do not have a website;
- Business websites post infrastructure imagery (72%) but only 37% include photos with visitors engaged in experiences;
- Calls to action are low (24%), as is online reservations (27%) and few (45%) advertise that they accept credit card payments;
- Helping visitors find where the business is located is beneficial for guests but only provided by 67% of the operators. The remaining 33% should add this element immediately;
- 41% of businesses across all sectors take advantage of TripAdvisor. This is more than the Central region (21%) Eastern (31%), Labrador (11%) and Western (28%);
- On the high end of the spectrum of TripAdvisor users are trails (76%), roofed accommodations (65%) nature based assets (46%);
- On the low end are program-based businesses (33%) and festivals and events (8%);
- Of those on TripAdvisor, 49% have professional photos posted;
- Few operators (25%) are engaging with their guests by providing feedback to TripAdvisor reviews, which represents a lost opportunity for reputation management;
- Only 10% of businesses with TripAdvisor have a link on their Facebook page making it easy for guests to move between the two places where visitor feedback/reviews are located;
- 60% have a Facebook account;
- Man-made attractions (100%), program based assets (86%), festivals and events (68%), roofed accommodators (60%), trails and nature (59%) and culture and activity based businesses (53%) lead with a Facebook presence;
- Festivals and events have the most number of "Likes" (84,679) followed by culture and heritage assets (55,5849); and
- 92% post photos, 48% videos, and 70% a link to google maps on Facebook.

Implications/Considerations for Operators

- 37 or 11% of tourism assets do not have a website and, while not a significant number, the web is where the majority of travellers go to plan their trip and make reservations. Operators may have a great product, but if the consumer cannot locate the business online, their product offer will not be in the consideration set of travellers and generating new business will be extremely challenging;
- Operators with a website need to optimize this channel and ensure that what is available matches expectations and interests of visitors. Consideration needs to be given to:
- Adding visitor testimonials;
- Increasing the number of photos of visitors engaged in the experience;
- Ensuring a clear call-to-action exists and is easily found as guests move through the website;
- Including detailed information on 'how to get here'. This can include a link to Google earth, a PDF downloadable map, GPS coordinates – anything that will easily help a visitor find the community and business;
- Identifying which online booking engines could be used to drive more visitors to the businesses and/or installing their own online booking engine;

- Adding links to their other social media sites (e.g. TripAdvisor, Facebook, Twitter, YouTube, Instagram) so visitors can quickly move around 'your world' for different types of information, including user generated feedback, which is important;
- The power of TripAdvisor and Facebook is not being fully leveraged; operators should:
    - Engage in regular conversations with guests by responding to TripAdvisor reviews of all ratings (1-5), post information to Facebook about things to do the area to increase interest in wanting to spend time in the community/region and creating a buzz about the community that contribute to the overall destination appeal;
    - Ask guests where they get online travel information to confirm if Facebook, TripAdvisor, Instagram or many of the other sites are feeding them information that influences, or influenced their travel decision to book;
    - Look for user-generated images and content from guests posting and link this to the website to add the 'voice of the customer'; and
- NEA leaders can review the TDVAA database to identify companies that are not using the basic online tools that travellers value and then connect them to HNL for training.

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/Place Based Business (IB)

There are 10 sub-categories of infrastructure/place based assets: transportation, visitor services, accommodations, culture-heritage, nature based, trails and routes, man-made attractions, shopping/retail, food and beverage, and conferences, meetings, trade shows.

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. [Almost]

IB2: The destination offers 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. [NO]

IB4: The destination offers variety of water-based amenities to accommodate visitors travelling by watercraft. [YES]

Table 11: Transportation Summary for the Northeast Avalon Region

Transportation Sector	Number servicing the region	Number of service locations	Year round service	High-season service	6-month of year service
Airlines	8	1 (St. John's)	6 (75%)	2 (25%)	-
Car Rental Companies	10	1 (St. John's)	7 (70%)	Not listed	
Bus/Coaches	12	2	12 (100%)	-	-
Ferries	1	2	100%	-	-
Taxi/Limousine Companies	35	7	35 (100%)	-	-
RV Rental Companies	1	1 (St. John's)	1 (100%)	-	-
Public Transit	2	1 (St. John's)			

Table 12: 2015 Cruise Summary for Northeast Avalon[35]

VESSEL	CRUISE LINE	2015	ACTUAL# PSNGRS	MAX. # PSNGRS	% of PSNGRS
Amadea*	Phoenix Cruises	Apr 29	-	-	-
Silver Whisper*	Silversea Cruises	May 8	-	-	-
Disney Magic*	Disney Cruises	May 21	-	-	-
Marina	Oceania	May 26	1,121	1,250	89.68%
Black Watch	Fred Olsen	Jun 13	599	807	74.23%
Crystal Symphony*	Crystal Cruises	Jun 17	-	-	-
Ocean Endeavour*	Adventure Canada	Jun 24	-	-	-
Ocean Endeavour	Adventure Canada	Jul 4	165	200	82.50%
Marco Polo	Global Cruise Lines LTD.	Aug 6	749	906	82.67%
Black Watch	Fred Olsen	Aug 20	676	807	83.77%
Veendam	Holland America	Aug 25	1,212	1,613	75.14%
AIDAluna	AIDA Cruises	Sep 6	2,266	2,500	90.64%
The World	Wilhelmsen	Sep 8	179	699	25.61%
Natl Geo Explorer		Sep 11	145		
Marco Polo	Global Cruise Lines LTD.	Sep 15	678	906	74.83%
Aidadiva	AIDA Cruises	Sep 16	2,050	2,500	82.00%
Caribbean Princess*	Princess Cruise Lines	Sep 17	-	-	-
Natl Geo Explorer		Sep 17	138		
Silver Explorer	Silversea Cruises	Sep 20	73	158	46.20%
Eurodam	Holland America	Sep 20	2,026	2,014	100.60%
Regal Princess	Princess Cruise Lines	Sep 22	3,465	3,605	96.12%
Albatros	V-Ships	Sep 24	626	1,000	62.60%
Ocean Endeavour*	Adventure Canada	Sep 25	-	-	-
Saga Sapphire	Saga Cruises	Sep 30	588	752	78.19%
Balmoral	Fred Olsen	Oct 13		1,400	0.00%
Aidamar	AIDA Cruises	Oct 30		2,174	0.00%
*** Cancelled**		**TOTALS**	**16,756**		

[35] Cruise the Edge, 2015 Newfoundland & Labrador Cruise Schedule, Revised December 2, 2015.

Table 13: Harbours Impacting Tourism

Harbours Impacting Tourism (n=10)	Meters of Draft	# of Jetties	# meters dock wall	# of Boats	# of Marinas	# transient slips
St. John's	6.3+	2	various	10+	1	2
Witless Bay						
Bay Bulls	4	3	1	25	1	2
Torbay	3+	0	2	80+	0	0
Petty Harbour	-	-	-	-	-	-
Conception Bay South	-	-	-	-	3	-
Royal Newfoundland Yacht Club	3+	0	250	133	1	10+
Sunset Key	0	0			0	
Foxtrap Marina	3+	1	0	60	1	2+
Quidi Vidi	-	-	-	-	-	-
Portugal Cove-St. Philips (PCSP)	-	-	-	-	-	-
Bell Island	-	-	-	-	-	-

Note: There was no information available for some locations and for mooring rates.

Table 14: Amenities of the Harbours Impacting Tourism

Harbours Impacting Tourism N=10	Number with Amenities	%
Gas	2	13%
Restaurant	2	13%
Showers	1	7.6%
Laundry	1	7.6%

Note: BTCRD identified that even though they have a gas station, this does not necessarily have fuel services as the waterside

Table 15: St. John's Airport Passenger Activity[36]

St. John's Airport Passenger Activity	2011	2012	2013	2014	2015 % +/-
Boarding Passenger movements Jan - Dec	683,319	725,657	745,769	790,097	747,216 -5.4%
Deplaning Passenger movements Jan - Dec	688,098	722,652	741,176	786,033	757,389 -3.6%
Total Passenger movements Jan - Dec	1,371,417	1,448,309	1,486,945	1,576,130	1,504,605 -4.5%
Estimate of non-residents Jan - Dec	234,868	248,041	254,983	270,338	257,107 -4.8%
Estimate of non-residents May - October	167,451	173,075	178,798	194,672	183,699 -5.6%
Estimated number of vacation travellers May - October	55,929	57,807	59,719	65,020	61,355 -5.6%

Key Findings

- The province received approximately 21,600 unique cruise visitors during the 2015 cruise season, a decrease of 19.6% compared to 2014;
- Budget reductions at the City of St. Johns will further impact their cruise ship welcome program in 2016 because staff that handled this function have been reassigned to other departments;
- Non-resident air arrivals at the St. John's airport were down 5.6 % in tourism season (May – October). Declines are attributed to a combination of factors: a reduction in private charter flights to Alberta as well as scheduled commercial traffic due to reduced oil prices and reduced oil production; the closure of the St. John's Convention Centre in 2015 resulting in a decrease of 15% in meetings and convention business; and the cancellation of flights and disruption for passengers resulting from poor weather conditions combined with airport construction during the installation of a new navigational system on the main runway at the airport;
- A new Category III landing system was installed at the St. John's International Airport in 2015. "This technology allows aircraft to land and take-off in conditions of very low visibility; a weather challenge that has had an impact on the airport's operations and our region's reputation for decades. As a result, 700 more flights / 70,000 more passengers will arrive and depart annually without delays."[37]
- The arrivals area of St. John's International Airport (SJIA) requires improvements in order to meet the basic airport services guests expect, in particular:
    - No public transit from the airport to downtown;
    - Inconsistent taxi service
    - Visitors picking up rental cars must walk a distance, even in inclement weather;
- Some hotels have airport shuttle service, especially those close to the airport;
- There is a Metro bus hop-on-hop-off visitor trolley that operates in peak season and picks up and drops off visitors at a number of culture and heritage sites. It was observed that the service is limited and at capacity especially on summer weekends;
- Car rental availability is an issue at the airport, especially when there is a city-wide convention or a major festival in town; when the convention centre opens, this could be a larger issue;

[36] Government of Newfoundland Labrador (March 16, 2016). Northeastern Avalon Performance Indicators. Document provided by the NL Department of Business, Tourism, Culture and Rural Development.
[37] St. John's International Airport. http://stjohnsairport.com/expansion-yyt/.

- CBS – no public transit, flat rate taxi to airport for $50, taxis will do tours but do not promote this;
- Portugal Cove-St. Philips (PCSP) – looking to have a partnership with Metro Bus to provide links to Bell Island and PCSP;
- PCSP – way finding signage being enhanced in 2016;
- Bell Island will be serviced by a new ferry and terminal in 2016 with same schedule, which includes a two-hour lunch break, which is not convenient for visitors;
- On-site assessment determined visitor way-finding signage is poor both in St. Johns and in the surrounding communities.

Implications/Considerations

- Enhancing the sense of arrival at SJIA will go a long way to create positive first impressions among visitors. As the main air gateway to the province, the airport authority is expected to provide an experience that exceeds the visitor's expectations or at a minimum provide best-in-class for an airport of their size and volume;
- Enhancements to the taxi experience are needed. The City should consider putting in place a set of standards that ensure operators have clean and up-to-date vehicles as part of the licensing process;
- Managing demand and supply for taxi services should be a priority; discussions with cab companies and operators should be initiated to solve peak time availability challenges and, at present, there is no sign that Uber will operate in St. John's;
- The lack of public transportation from the airport to downtown is a major shortcoming; solutions should be explored with Metro Bus or independent operators;
- Accessing the surrounding communities is a challenge unless guests have their own vehicle or rent a car – providing public transit options would enhance visitation to these communities. This limits the potential for visitors to choose these close, outlying communities which could offer an authentic experience near the city;
- Visitor way-finding signage must be improved throughout the region and, in particular, in St. John's;
- Enhance the Bell Island ferry schedule to avoid a two-hour shut down over the lunch hour.

Visitor Information Services

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

Table 16: Regional VICs

	Provincial N=1	Regional N=4
Number with public washrooms	100%	100%
Number with free internet access or Wi-Fi	100%	0%
Number with password internet access or Wi-Fi	0%	50%
Number that operate year round	100%	75%
Number that operate six months of the year	0%	0%
Number that operate high season only (Jun – Sep)	0%	25%
Total number of VIC staff	5FT, 3 PT	11FT, 25 PT
Provide print information	100%	100%
Gift shop/retail	100%	50%
Video viewing area	100%	50%
Picnic area or place to sit and eat	0%	25%
Able to purchase food	100%	25%

Museum or displays/artefacts available	100%	50%
Guest computer available for visitor use	100%	75%
Place to plug in and charge electronics	100%	100%
Staff regularly Tweet about destination	0%	25%
Staff regularly update regional/VIC Facebook account	100%	25%
Able to make bookings/reservations for traveller	100%	75%

Figure 4: Provincial Visitor Information Centre Statistics 2015[38]

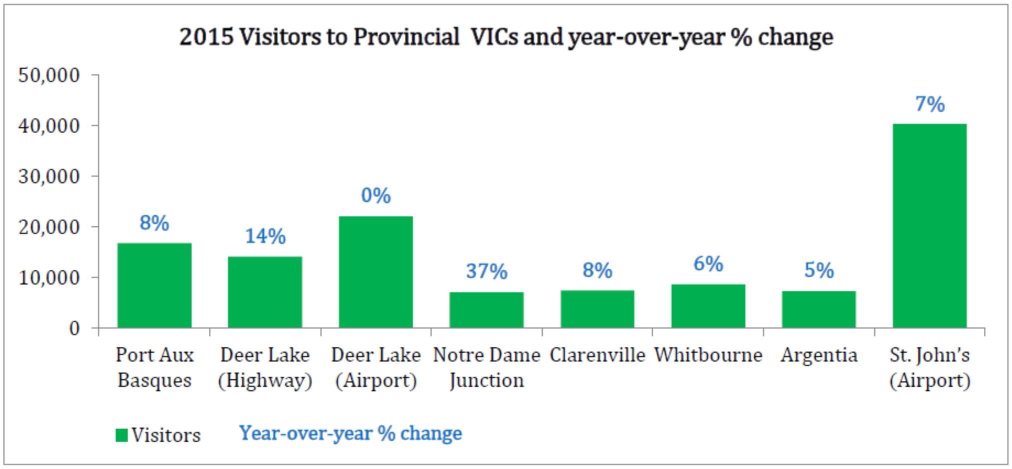


Table 17: NEA Visitor Information Centre Statistics 2012 - 2015

Visitor Information Centre Statistics –	2012	2013	2014	2015	% Change 2014 / 2015
St. John's Airport Operating Season Jan – Dec	56,442	59,405	56,822	59,368	4.5
St. John's Airport May 15 – Oct. 2	40,477*	33,758	36,278	40,280	11.0
City of St. John's	14,421	11,837	11,989	12,794	6.7
Plantation at Quidi Vidi	5,865	9,026	14,324	17,748	24.0
Bay Bulls	15,091	15,231	11,106	14,208	28.0
Manuels River	NA	5,060	5,398	5,707	5.7

Key Findings

- Visitor inquiries at the airport and city centre VIC increased in 2015;
- Recent budget reductions at the City will impact the downtown VIC's reducing it to a seasonal operation (high season) starting in 2016;
- It is unknown at the time of this report if City budget reductions will impact the airport VIC operations (the City and the SJIAA partners with the province to operate this VIC);

38 Government of Newfoundland & Labrador. (2016, March). *Performance Report,* Department of Tourism, Culture and Recreation.

- Visitor inquiries / traffic at community based VIC's in Bay Bulls and Manuels River were up in 2015
- The Town of Torbay is adding a seasonal VIC in the Town Hall / Museum;
- PCSP / Bell Island ferry terminal may include an unmanned VIC / kiosk;
- Mount Pearl has a VIC within Admiral House Museum operated by the Chamber of Commerce.

Implications/Considerations

- The St. John's Airport VIC provides a valuable service to visitors and locals alike, providing quality visitor information and guidance;
- With potential gaps in supplying visitor information from the downtown VIC location in the off-season those who operate businesses with primary points of visitor contact (accommodators, attractions etc.) should be prepared to provide basic to enhanced levels of visitor information when asked; and
- Surrounding communities, who are making investments in providing visitor information services, should do so against the backdrop of evolving customer behaviour related to hand-held devices that provide vast amounts of information on demand.

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. [YES] (10 properties)

Table 18: Accommodation Statistics 2015

Category	# Of Properties	# Of rooms /sites	Daily Price Range	% Year Round	% High Season (May – Sept)	% Open at least 6 months
Hotel/Motel	29	2,310	$79 - $560	97%	-	3%
B&B	29	143	$75-$1,000	66% *	10% *	21% *
Inn	13	8	$80-$3,400	50%	25%	25%
Cottages, House Rental Hostels	20		$90-$1,650	86%	14%	-
RV Parks and Campgrounds	4	422	$10-$60	25%	75%	-

Source: TDVAA Data Collection Template, Seasonal information not available for all B&Bs

Table 19: Newfoundland and Labrador Roofed Accommodation Occupancy by Region[39]

Region	2014	2015	Point Change	Average Daily Rate
Province	50.8	50.5	-0.3	$134.77 (+1.8%)
Avalon Region: Zones 17-20, St. John’s	62.3	57.5	-4.8	$143.45 (- 0.6%)
Eastern Region	43.1	43.7	0.6	$119.96 (+5.3%)
Central Region	40.0	43.7	3.7	$131.21 (+8%)
Western Region	40.6	43.8	3.2	$122.82 (+3.3%)
Labrador	56.4	56.8	0.4	$137.01 (+4.7%)

[39] Government of Newfoundland Labrador (2015, Mar.) *Year-End Provincial Tourism Performance 2014.* Document provided by the NL Department of Business, Tourism, Culture and Rural Development.

Table 20: Provincial Occupancy 2009 - 2015[40]

Year	Room Nights Available	Room Nights Sold	Occupancy Rate	Room Revenue	REVPAR	ADR
2015	2,771,399	1,398,220	50.45%	$188,432,937.08	$67.99	$134.77
2014	2,737,075	1,391,577	50.84%	$184,183,810.62	$67.29	$132.36
2013	2,663,558	1,374,240	51.59%	$175,403,994.45	$65.85	$127.64
2012	2,686,198	1,347,795	50.17%	$163,116,637.29	$60.72	$121.02
2011	2,649,413	1,342,997	50.69%	$155,282,408.96	$58.61	$115.62
2010	2,649,948	1,327,522	50.12%	$147,906,026.18	$55.81	$111.42
2009	2,611,716	1,256,846	48.12%	$135,546,144.76	$51.89	$107.85
2015 by Quarter						
Jan-Mar	624,981	240,562	38.49%	$29,868,132.40	$47.79	$124.16
Apr-Jun	722,161	351,804	48.72%	$47,188.851.37	$65.34	$134.13
Jul-Sep	782,136	528,283	67.54%	$75,072,920.25	$95.98	$142.11
Nov-Dec	642,121	277,571	43.23%	$36,303,033.06	$56.54	$130.79
Source: Accommodation Component of TDMS II. Data for 2015 is based on information received and entered into TDMS as of April 29, 2016. Data is subject to revision pending further reporting by operators.						

[40] Government of Newfoundland & Labrador. (2016, March). Department of Business, Tourism, Culture and Rural Development. *Note: The occupancy and average daily rate data should be the sample (properties) reporting. considered as preliminary/estimates. Room nights sold, room nights available and room revenue should be considered counts/totals for the sample (properties) reporting.*

Table 21: North East Avalon Region Economic Zone 19, Accommodation Statistics 2011 – 2015[41]

ROOFED ACCOMMODATION OCCUPANCY - Economic Zone 19						
Jan - Dec ALL PROPERTIES	**2011**	**2012**	**2013**	**2014**	**2015**	**Pt/ % Chg. 2014/15**
Occupancy rate	69.5	70.7	73.9	68.2	62.1	-6.1 Pts
Room nights available	878,805	852,025	837,342	900,589	951,031	5.6
Room nights sold	611,110	602,563	618,949	614,474	590,724	-3.8
ADR	$128.59	$134.13	$141.33	$147.50	145.99	-1.0
Jan - Dec Hotels/Motels/Resorts/Suites						
Occupancy rate	71.2	72.2	75.1	68.9	63.9	-6.0 Pts
Room nights available	799,532	783,069	773,134	849,550	882,323	3.8
Room nights sold	569,419	565,020	580,249	585,653	564,235	-3.6
ADR	$129.39	$134.84	$142.08	$147.79	146.47	-0.9
Jan - Dec B&Bs/Inns						
Occupancy rate	52.1	54.3	60.1	55.8	47.5	-8.3 Pts
Room nights available	70,926	60,730	55,843	44,114	38,451	-12.8
Room nights sold	36,917	32,988	33,589	24,609	18,249	-25.8
ADR	$124.92	$131.39	$138.66	$148.64	159.34	7.1

Table 22: North East Avalon Camping Statistics 2011 – 2015[42]

COMMERCIAL CAMPGROUNDS					
May - Oct	2011	2012	2013	2014	2015
Occupancy rate	58.7	66.6	64.6	65.1	72.7
Site nights available	51,538	59,142	64,810	68,999	77,464
Site nights sold	30,229	39,363	41,890	44,950	56,322
ADR	$24.63	$24.41	$25.57	$27.46	23.81

[41] IBID

[42] Government of Newfoundland & Labrador. (2016, March). Document provided by the Department of Business, Tourism, Culture and Rural Development.

Table 23: North East Avalon Region Provincial Park Camping Statistics Butter Pot 2011 – 2015[43]

PROVINCIAL PARKS Registered Camping Units and Seasonal Occupancy				
Butter Pot	**Year**	**Season**	**Units**	**Occupancy**
	2011	May 18 - September 19	14,326	66.0
	2012	May 16 - September 17	14,919	72.9
	2013	May 15 - September 16	14,840	72.5
	2014	May 14 - September 15	13,950	68.1
	2015	May 16 - September 14	13,837	68.8

Table 24: Emerging/Non Traditional Accommodations Listings

Emerging/Non Traditional Accommodations	# of Listings	Price Range
Airbnb	218	$22-$1,797
Hostels (46 beds)	1	$34 -$38
University Residences (MUN 1,900 beds)	1	$62-$143
VRBO/Home Away	97	$46-$383
FlipKey (TripAdvisor)	114	$71- $651

Key Findings

- St. John’s has an extensive array of accommodation options including branded properties available year-round and at a variety of price points;
- Roofed accommodation inventory in St. John’s will grow by 500+ rooms as a result of new properties being built over the next two to three years;
- There is scheduled new hotel builds for the downtown, however, only one property will be situated within close proximity to the convention centre;
- Airbnb is making their presence known in the region, there are 218 listings currently, this number has grown from the time the initial assessment was completed in the summer of 2015;
- In 2015, NEA experienced declines in occupancy and average daily rate (62.1% and $145.99 ADR) as a result of a growth in inventory and declines in energy and resource based business travel. Declines were attributed, in part, to additional room inventory (Jag Hotel +84 rooms, Memorial University MacPherson College +254 seasonal rooms May-Aug.) and decline in MC&IT business as a result of the construction of the convention centre expansion;
- In spite of occupancy declines, the region still outperformed the provincial (50.5% and $134.77 ADR) and national $144 ADR;
- A legislative hotel tax of 4% is in place with funds raised directed to DSJ for sales and marketing of the destination and utilized by the City of St. John’s to fund the convention centre expansion;
- There are limited accommodation options in the surrounding communities;

Implications/Considerations

- The region’s accommodation options present guests with variety and choice; this will only be enhanced with the addition of new branded hotel properties;

[43] Ibid.

- During peak travel season when a convention is in town and/or a festival or event is being staged, hotel room availability is limited;
- New hotel inventory will help alleviate inventory pressure, however, only one new property is located within close proximity of the convention centre, and;
- Over the past several years, St. John's strong hotel performance (due primarily to energy and resourced based business travel) has driven up ADR compared to other major Canadian cities; according to DSJ, this can put the city at a competitive disadvantage when competing for national MC&IT and sport based business.

Culture – Heritage Based Assets

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

Table 25: Number of Culture-Heritage Based Assets in the Destination

Type	**# of Properties N= 74**	**Adult Price Range**
Archaeological Sites	17	Free - $7.50
Art Galleries and Murals	10	Free - $12.00
Artists in Residence Program	4	Varies, prices not listed
Eco-museum	0	
Genealogy	21	Free - $12.00
Lighthouses	4	Free - $12.00
Monument, memorials & plaques	36	Free and donations
Museums/Cultural/Historic Attractions	54	Free - $12.00
National Historic Sites	10	Free - $6.00
Performing Arts	6	Prices vary by performance
Provincial Historic Sites	4	Free - $6.00
Performing Arts Venues	7	Free - $8.50

Note: Some assets fall into several categories.

Table 26: NEA Historic Site Performance

NEA Historic Sites	2014	2015	% Change
National Historic Site Visits[44]			
Signal Hill* (excludes May-Jul 2014)	20,898	24,774	18.5
Cape Spear Visitor Centre	20,408	14,553	-28.7
Provincial Historic Site Visits[45]			
Commissariat House	5,633	5,598	-0.6
Newman's Wine Vault	4,536	6,400	41.1
Quidi Vidi Battery	Not Open	Not Open	-
Other Site Visits[46]			
The Rooms– Jan - Dec	65,385	70,881	8.4
The Rooms – May - Oct	42,681	46,686	9.4
Bell Island #2 Mine Tour, Jun -Oct	9,940	11,990	20.6
Johnson GEO Centre, Jan - Dec	52,067	51,027	-2.0
Railway Coastal Museum	15,750	13,992	-11.1
Petty Harbour/Maddox Cove Museum	N/A	N/A	-

Note: Signal Hill (Cabot Tower) was closed for May, June and July for renovations. For the full 2014 operating season Signal Hill (Cabot Tower) received 37,360 visitors.

Key Findings

- Provincially visitation to National Historic Sites grew by 7.7% or 99,841 visitors in 2015;
- Cabot Tower on Signal Hill was the top visited site in the province, attracting nearly 25,000 visitors in 2015, visitation to Cape Spear Visitor Centre (primarily an outdoor experience) decreased by 29% primarily due to poor weather in July;
- National sites added culinary based programming at both sites; for example, a chocolate café and wine and port tasting events at Signal Hill and a Cape Spear dinner experience sold out in 14 hours;
- Signal Hill will offer guided tours focused on military history in 2016 and is making enhancements to the Visitor Centre in order to accommodate small groups;
- Visitation to all Provincial Historic Sites grew by 18.7% or 85,488 visitors in 2015 operating season. This growth was attributed to growth in local community partnerships, enhanced programming, better promotional efforts, longer operating season, high number of icebergs in 2015 and increased group/motor coach visits;[47]
- Provincial Historic Sites adding culinary, concert and hands-on programming and experiences;
- With 74 culture-heritage based assets, most of which operate year-round and available at a variety of price points, visitors to the NEA region have many options to experience the culture and heritage of the region;
- Most culture and heritage attractions saw increased visitation in 2015;
- The Masonic Hall restoration project is underway, however, fundraising challenges have impacted the progress;
- There are plans to redevelop the former Flake House in Quidi Vidi by a private developer. The

---

[44] Government of Newfoundland & Labrador. (2016, March). Annual Tourism Performance Report. Document provided by the Department of Business, Tourism, Culture and Rural Development. Source: Parks Canada National Historic Sites, operating season may vary.
[45] Ibid
[46] Ibid
[47] Ibid

Development is in approval stages with the City of St. John's.

- During consultation sessions, observation was made that culture/heritage organizations are not connected to one another or to the tourism industry and therefore, are not leveraging opportunities to add to the visitor experience or grow site visitation;
- There is a Metro Bus hop-on-hop-off visitor trolley that operates in peak season and picks up and drops off visitors at a number of culture and heritage sites, however, it was observed that the service is limited and at capacity, especially on summer weekends;
- The bus service has helped to connect site operators to one another as they contribute dollars as a collective to promote the hop-on-hop-off service;
- Several of the surrounding communities (Petty Harbour, Bell Island, Manuels River, Witless Bay) have culture or heritage sites and attempts are being made to add sites in another few communities;
- The Town of Torbay is working to purchase the Priest's House from the diocese to convert it to a museum;
- Manuels Rivers Interpretation Centre has ongoing programs and they are attempting to add to the inventory by including new local cultural stories delivered by volunteers;
- PCSP has an identified heritage coordinator that offers a backdrop for potential interpretive historic walks; these would originate at the Portugal Cove ferry terminal in season; and
- In Mount Pearl, the Admiralty House Museum is the lone tourism attractor.

Implications/Considerations

- Sites that responded to visitor expectations by making enhancements to programming saw increased levels of visitation;
- PHS and Metro Bus are encouraged to work together in order to enhance the frequency, capacity and number of stops (sites) of the hop-on-hop-off bus service in order to attract more visitation;
- Attempts should be made to enhance opportunities for the cultural and heritage sites to better connect with the broader tourism industry in order to enhance the visitors experience and grow visitation to the sites;
- Efforts to see the restoration of the Masonic Hall should be supported on all fronts as this venue, when renovated, will not only be better equipped to deliver more appealing programming, it will provide new needed off-site meeting / special event space for the MC&IT market;
- A new development in line with the environs of the Village will help preserve the history of Quidi Vidi Village;
- The Rooms is a leader in programming, however, it is reported the organization focuses on its own activities. As a lead culture and heritage site, The Rooms has an opportunity to positively impact its tourism visitation by proactively engaging for collaborative partnerships with other culture and heritage sites to enhance the visitor experience; and
- Heritage site operators in several of the surrounding communities should be realistic as to the appeal their culture and heritage sites have beyond the local community.

Nature Based Assets

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

Table 27: Number of Nature Based Assets in the Destination

Type	# of Sites / Properties N=27	Price Range
Beaches	3	Free
Ecological Reserves	2	Not available
Gardens/Community Parks	9	Free
Geology and Fossils	3	Free - $12.00
Lookout / Viewing Point	6	Free - $3.90
National Parks (Signal Hill & Cape Spear)	2	Free - $3.90
Natural Attractions	19	Free - $8.50
Provincial Parks	2	Not available
Seabird Ecological Reserve	1 (special permit required)	Not available

Note: Some assets fall into several categories.

Key Findings

- DSJ positions St. John's as "urban on the edge of nature" due to its close proximity and accessibility to numerous natural outdoor sites and attractions found in the surrounding communities;
- The surrounding communities have numerous natural assets, many of which are unique and hold appeal to those who travel to the region;
- DSJ has a strong desire to partner with surrounding communities in order to facilitate an easy link to the natural sites and attractions for all market segments (leisure, MC&IT, sport);
- These natural sites have particular appeal to those who want a taste of Newfoundland and Labrador, but may have travel restrictions that prevent them from getting beyond the NEA region; and
- Like other regions in the province, there is concern that the natural assets do not generate sufficient revenue, therefore their sustainability is in question.

Implications/Considerations

- DSJ's brand position of "urban on the edge of nature" aligns with the brand position of Destination Canada who has this as one of their five pillars to promote Canada and other major cities like Vancouver, Edmonton, and Montreal with powerful nature-based opportunities just outside major cities;
- Surrounding communities are encouraged to develop their natural assets to cater to their local residents but also to those who visit the region and are looking to discover NL's brand of natural and rugged beauty;
- The natural experiences found in the surrounding communities serve to extend length of stay and spending of visitors;
- Opportunities to continually examine ways to enhance the visitor experience beyond self-discovery (non-revenue generation) and determine if there could be a wider range of ways a visitor can engage with nature based assets, thus creating a greater sense of place through higher engagement and interaction with guests; this supports charging higher admission rates or fees for a program; and
- Surrounding communities are often responsible for promoting nature-based assets and should have a

map of how to get there, information about each asset, what to bring, how long to plan for, amenities, etc. The more appealing, the more likely a visitor is to come, enjoy, stay, and revisit.

Trails and Routes

IB6: The destination has driving routes that direct visitors through the Destination (e.g. Arts Trails). [YES]

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

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

Table 28: Trails & Routes in the Destination

Type	**# Routes N=34**
Themed driving routes with interpretation	2
Themed driving routes with signage	2
Walking/hiking with interpretation	28
Walking/hiking with signage	31
City/town based heritage interpretive trails	23
ATV Trails	1
Back Country Hikes	14
Coastal Trails	20
Hiking and Walking Trails	33
Mountain Biking	16
Town and Country Treks	13
Trails in National and Provincial Parks	3
Ski Trail	21
Snowmobile Trails	1
Waterfront Promenade	1
Warfside Promenade	5
# that meet provincial standard	33

Note: Some assets fall into several categories.

Key Findings

- The region’s connection to the East Coast Trail, Trans Canada Trail and Grand Concourse is very important as it allows easy access to some of the provinces most celebrated trail networks. In recent years, DSJ has seen growing interest and participation in hiking trips along these trails;

- In PCSP trail development is a priority; currently there is a mountain biking project in the pipeline in progress;
- In Torbay, there are two East Coast Trail routes that connect the community to the rest of the trail;
- In CBS, 10 km of T'Railway redevelopment has taken place and a further 8 km is left to develop (another project in the pipeline);
- Manuels River Trail and Chamberlains Park trail has been monetizing by connecting these trails to Main Street District and the local Business Industry Association (BIA) is working to connect hikers and local connect businesses;
- In Mount Pearl, trails are core to the "park within a city" positioning; these include groomed trails for non-motorized winter sports;
- There is a local Mountain Bike group within St. John's wanting access to the trail networks but this is not being embraced by municipal trail groups or the East Coast Trail Association;
- As reported in the Western region TDVAA, and equally relevant to the NEA region:
- BTCRD is spearheading a "cluster based" approach for trail development throughout the province; this approach capitalizes on the presence of trail networks and connects trail groups to local community tourism-based businesses to ensure that trail development is done as a collective effort in order to enhance the visitor experience, extend visitation in an area and drive economic impact;
- The Atlantic Canada Trail Association has produced an Assessment Trail User Guide, the contents of which details the specific requirements for trail development and maintenance; those involved in trail development should (if they have not already) avail themselves to this helpful tool and determine "trail readiness" within the NEA region;
- By aggregating the TDVAA trail development findings in the Eastern, Labrador, Western, Central and the North East Avalon regions, a stronger visitor experience will be created that invites and entices people to move around the province based on specific attributes;
- Few charge for use of the trails, albeit they attract visitors to the area who may spend money in the local community;
- This was a limitation to trail maintenance and management identified by different operators in the stakeholder sessions; and
- Provincially, non-resident travel parties, participating in trail hiking as a trip activity, report an average in-province per party expenditure of $2,213 and an average in-province per person expenditure of $1,102 per trip. On a per person per nightly basis, travel parties participating in trail hiking reported an average in province expenditure of $120[48].

Implications/Considerations

- The region's trails with viewpoints for iceberg and whale watching are truly distinctive; promotion of these trails should be optimized to draw travellers who want an outdoor and urban experience;
- The province and municipalities should consider a tariff system for trails for high-use groups to ensure they are maintained and investment in the visitor experience is made in order to attract more guests;
- Investigate additional ways to package the trails with other events, reasons to stop and stay, and to round out an experience; and
- Ensure trail development, especially in the surrounding communities, address the importance of having appropriate signage (trail heads, to interpretation), washrooms, information on aspects such as weather and wildlife, along with a trail map is important.

---

[48] Government of Newfoundland and Labrador, Tourism Research Division. Department of Tourism Culture and Recreation. *2011 Exit Survey – Profile of Non-resident Trail Hikers.*

Recreational and Man-Made Attractions

IB7. The destination has man-made attractions at a variety of price points. [YES]

Table 29: Recreational & Manmade Attractions in the Destination

Assets	**Number N=11**	**Price Range**
Amusement Park	2	Donation - $18.00
Driving range	2	Prices not provided
Golf courses	4	$30-$70
Mini-golf	2	Donation - $12.00
Outdoor Theatre	1	Donation
Rock Climbing	1	$31.00
Science Centre	2	Donation - $12.00

Key Findings

- A consistent characteristic in NL, there are very few (11) manmade attractions in the region;
- In Torbay, Breakout NL, is a new attraction that asks guests to "break out" of various situations in a simulated environment; for example, break out of the Titanic;
- In Torbay, the Jack Byrne Arena is now owned by the Town. This is a multi-use facility that can host MC&IT events and trade/consumer shows; they recently hosted the East Coast Music Awards; and
- In CBS, the Manuel Rivers/Hibernia Interpretation Centre is a manmade attraction that delivers a series of hands-on learning programs as well as outdoor interpretive activities.

Implications/Considerations

- Given limited resources to invest in tourism development, further development into man-made attractions is not warranted, however, enhancements to existing sites in order that they remain relevant is very important; for example, at the Johnson GEO Centre.

Shopping & Retail

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

Table 30: Shopping Businesses in the Destination

Shopping	# Of Properties N= 64	% Year Round	% 6 months + operation	% high season only
Art or Craft *Studios*	31	83%	11%	6%
Antique Dealer	6			
Craft Shops	41			
Commercial Art Galleries	34			

Note 1: Properties can identify themselves in more than one shopping category in TDMS and not all businesses in the region have elected to list on TDMS.

Key Findings

- There are 64 shopping and retail offerings found in the region with the vast majority located in St. John's; of these, most are stores that feature art, crafts and antiques;
- The product diversity includes: knitting, weaving, pottery, candles, photography, glass, metal, jewelry, furniture, rug hooking, folk art and paintings;
- The Craft Council of Newfoundland and Labrador (CCNL) has standards for businesses to attain. They provide opportunities for artists to sell their goods at the CCNL shop in St. John's, at various art shows and gain exposure in the CCNL publication. However, the standards are different than those outlined in the provincial Tourism Assurance Plan (TAP), so unless a company also meets the provincial TAP standards, they cannot be marketed on the provincial tourism website;
- The most popular areas of the province visited by non-residents visiting a craft/gift shop include St. John's, Gros Morne, Gander/Twillingate East to Terra Nova and the Bonavista Peninsula[49];
- The majority of the stores are open year-round (83%) with 11% open six months and 6% open only in high season;
- DSJ conducted a survey among its MC&IT delegates, respondents noted that many retail shops closed at 5pm limiting their ability to shop as part of their conference activities. As a result, DSJ encourages its retailers to extend their hours in May through October;
- St. John retailers post signage in their windows to welcome delegates from specific meetings that are in town – This is a joint initiative of DSJ and the City of St. John's;
- In PCSP, there will be visitor friendly retail in the Bell Island ferry terminal; and
- The surrounding communities do not have tourism related retail; however, do have most of the big box stores found in most urban areas.

Implications/Considerations

- Purchasing local arts and crafts is important to visitors, therefore, it is important to support and promote existing retailers, especially those providing unique retail experiences; and
- Artisans are encouraged to develop learning based experiences within their studios, galleries and shops. Quidi Vidi Village Plantation as an artisan incubator-visitor centre is doing this. These hands-on experiences can be sold to visitors representing a potential new revenue source. BTCRD, supported by HNL through the provincial skills & knowledge program, could provide experience coaching for operators with the greatest potential to raise the bar on the visitor experience and create

[49] Government of Newfoundland and Labrador Tourism Research Division. (2011). *2011 Exit survey profile of non-residents visiting. The province's craft/gift shops.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit_Survey_Craft_and_Gift_Shopping.pdf

new products for market.

Culinary, Food and Beverage

IB9.1 The destination has restaurants with a variety of options and price points. [YES]

IB9.2 The destination offers food and beverage options that respond to the needs of various travellers. [ALMOST]

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

Table 31: Culinary, Food and Beverage in the Destination

Food and Beverage	#	% Year Round	% 6 months + operation	% high season only	# with critical acclaim	# with accredited chef	Range of main entree
Total Number *	328	95	2	3	4	Unidentified*	$8- $40
Casual Dining	200						
Catering	48						
Fine Dining	27						
Fast-Food	160						
Coffee Shops	40						
Bakeries	18						
Pubs/Bars	49						
Other)	3						

*This information was not included in the data assessment, however it's safe to say there are chef's in the NEA region.

Table 32: Specialized Food and Beverage Options in the Destination

Food and Beverage*	Number	Percentage
Vegetarian/Vegan	170	52%
Gluten Free	60	18%
Heart Healthy (e.g. low sodium, low fat, whole grain)	30	9%
Local foods (from the region)	164	50%
Local Newfoundland & Labrador recipes	93	28%
Local beverages (wine, beer, ciders)	129	39%
Ethnic food (Chinese, Greek, Italian, etc.)	63	19%
Child menus	96	29%
Senior menus	9	3%

Table 33: Culinary Themed Establishments in the Destination

Culinary	# of Properties	% Year Round	% 6 month + operation	% high season only	# with Hands-on Experiences
Breweries	1	100%	-	-	1
Chocolate Factory	1	100%	-	-	1

Key Findings

- There is a total of 328 food & beverage locations in the region, the majority (95%) are open year-round and they offer a wide range of food options at a variety of price points;
- There are 49 bars or pubs, many offer food and 10 offer live music performed daily or weekly;
- The food and beverage story is growing, many establishments have gained regional or national notoriety and this is contributing to the reputation of St. John's as an emerging culinary destination;
- It is reported that the emergence of several innovative restaurants and creative chefs (Mallard Cottage; Raymonds Restaurant; Chinched Bistro) have helped contribute to this notoriety;
- The attention has influenced and encouraged more restaurants to get on board and offer outstanding cuisine options;
- Food has emerged as a core attractor as numerous travel media have written food specific articles, for example "Jeremy Charles: Canada's Real Top Chef" 50;
- It is reported by DSJ that St. John's culinary tourism opportunities have flourished due to discovering and leveraging the unique tastes of the region's land and sea food and beverage options;
- George Street is St. John's iconic street known for its authentic pubs, clubs, restaurants and music festivals, however, it's widely known that the street needs an overhaul and from a tourism destination standpoint, it is not the primary attractor it once was;
- The George Street Association claim George Street is the "Heart Beat of the City"
- The street plays host to 10 days of music festivals and events;
- A 2007 study and study re-fresh done in 2011 identified the challenges, however, little has been done to address challenges;
- Concerns around safety, security, accessibility, aesthetics, signage, maintenance is reported in both studies;
- In 2015, the association released the 2016 George Street Association 10 Step Action Plan, which once again identifies a series of challenges and solutions to alleviate the problems and it is hopeful that between the association members and the City of St. John's action will be taken; and
- In terms of the food and beverage offering in the surroundings communities, options are largely limited to fast food and chain restaurants, creating a gap for visitors who are looking for authentic NL cuisine while travelling outside of St. John's.

George Street Association 10 Step Action Plan

Implications/Considerations

- With the notoriety of St. John's culinary offering, continued development and promotion of this appealing and attractive asset will no doubt have positive impact on the visitor experience and may

50 Globe & Mail. (Sept. 9, 2014) http://www.theglobeandmail.com/life/jeremy-charles-canadas-real-top-chef/article20495580/

provide inspiration or leadership to other parts of the province;
- Increasing unpaid media coverage of the St. John's food scene will serve to dispel negative perceptions about the food and beverage offering in Newfoundland and Labrador for this region;
- There is an opportunity for RANL to use successful restaurateurs in St. John's as examples of innovative food and beverage operations in order to motivate others throughout the region and province to rethink their business models;
- Attention must be given from an operator, City and perhaps provincial perspective to implement the recommendations contained in the George Street 10 Step Action Plan; and
- Encouraging performance of live entertainment, especially authentic music core to the regions heritage, must continue at pubs, bars, restaurants and festivals throughout the region.

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. [YES]

Table 34: Conferences, Convention and Meeting Space in the Destination

Conference/ Convention Centres/Meeting Space	
Number of Venues	43
Person Capacity (Total theatre seating)	7,594
Person Capacity (Ballroom rounds/seating)	5,812
Trade show or exhibit space (square footage)	63,157
Provide Plenary Space and Break Out Rooms	11 venues
Provide Onsite Catering	37 venues
Provide Onsite AV Equipment/ Support	29 venues
Have Sufficient overnight accommodation	9 venues
Open Year-Round	43 (100%)

Table 35: St. John's MC&IT Performance

	2011	**2012**	**2013**	**2014**	**2015**	**% Change (2014-2015)**
# of Events (50+ Delegates)	104	90	104	99	82	-17.2
# of Room Nights	44,425	32,344	42,252	37,600	30,562	-18.7
# of MC&IT Delegates	22,700	22,089	25,907	24,490	21,215	-13.4

Note: St. John's Convention Centre was closed in 2015.

Table 36: St. John's Detailed MC&IT Performance 2013-2015

	2013		2014		2015	
	Hotel Rms. Purchased**	Economic Impact $*	Hotel Rms. Purchased**	Economic Impact $*	Hotel Rms. Purchased**	Economic Impact $*
Overall	610,775	87,767,791	603,040	90,679,125	584,459	87,072,180
Large Conventions/Events 50 peak+	42,252	6,075,415	37,600	5,653,912	30,562	4,555,877
Small Meetings 10 – 49	19,945	2,867,892	21,778	3,274,758	19,188	2,860,355
Group Tours	5,051	726,283	6,159	926,129	7,380	1,100,137

Source: Destination St. John's 2015 Annual Report
*Calculated based on 2015 Room Rate Average = $149.07
**Data represents accommodations in the City of St. John's

Key Findings

- St. John's Convention Centre expansion represents opportunity to grow tourism revenues – DSJ continues to secure future MC&IT business at a solid pace;
- DSJ responded to 178 RFPs in 2015, 50% came from third party meeting planners;
- The positive NL image goes a long way to attract and secure meetings business from away, providing opportunities for delegates not only to attend meetings but also to "taste a little NL";
- Delegates can easily leverage a variety of pre/post-convention experiences in and around St. John's;
- There are venue gaps or limitations when planners want to get out of the hotel or the convention centre for an on off-site meeting or event;
- Recruiting and retaining experienced sellers in the market place is critical to meeting the ever increasing demands and expectations of professional meeting planners, event managers and group tour operators. Third party meeting planners, in particular, demand fast turn arounds on requests for proposals and expect very comprehensive, professional and client-centered responses carried out with a sense of urgency;
- According to DSJ, increasing numbers of customers seek out and value the professional services of destination management companies (DMCs) within the destination. Clients seek competitive bids from full service DMCs who can offer creative and relevant approaches to meeting their customers' wants and needs;
- There is a limited number of convention service companies who provide specific meeting related services like registration, ground transportation, off-site event planning, décor, AV, staging etc.;
- Against the backdrop of an extremely competitive marketplace, DSJ is creative when attracting business especially when hotel rooms come at a premium during peak season (ADR higher than national average)
- To maximize new convention centre expansion, the centre must have the flexibility to accommodate more than one organization's meetings at the same time;
- DSJ reports there is high demand among planners for off-site venues which can seat 200+ people for a sit down meal. In St. John's, groups of this size must have their dinner in one of the two convention hotels or at the convention centre. Groups like to take their guests outside of the host hotel, for at least one evening, so that they can get a feel for the city and enjoy the coastal views, colourful architecture, sheltered harbour or green open spaces;
- There are currently a number of potential new off-site venues in the pipeline, the Masonic Temple, the former Battery Hotel, which is being repurposed by Memorial University, and the former Flake House Restaurant in Quidi Vidi;
- Venues for stand up Opening Receptions are also in demand. The Rooms and the Johnson Geo Centre are two popular locations but clients need choice in terms of character, size and cost. The Colonial Building, a Provincial Historic Site, currently being refurbished and restored, could also be a

possible venue. The Community Market is a space for receptions and culinary tourism experiences.

- With increased airline lift in and out of St. John's from Canada and select international markets (UK and Ireland), it is easier for planners to consider St. John's for their meetings;
- DSJ conducted a FAM trip for European meeting planners in 2015 with very positive results;
- There are limited MC&IT opportunities available to surrounding communities given the lack of roofed accommodation options in those communities – there are opportunities to secure local meetings and conferences that do not require an overnight stay in roofed accommodations – it must be recognized these meetings do not have the same economic impact as regional, provincial or national meetings; several of the communities have taken steps to enhance their meeting venues:
- Torbay, Jack Byrne Arena – now a versatile venue for local meetings and conventions, hosted East Coast Music Awards in 2015;
- CBS – Manuels River, opening new arena, will purchase pipe and drape, sound stage and meeting infrastructure to support local conferences; and
- Mount Pearl – can host at Glacier Centre, Reid Centre (Summit Centre) gymnasium that can host trade shows, consumer shows – local in nature, not actively soliciting trade show business.

Event / Sport Tourism

A Sport Tourism Strategy[51] was developed for the St. John's region in 2012. Implementation is guided and directed by the Sport Tourism Event Partnership (STEP). While Destination St. John's is responsible for the sales and marketing priorities of the strategy, other STEP partners are leading initiatives critical to destination development. Three key priorities were recently identified by DSJ as having significance:

- Capacity Building: There are critical capacity issues respecting Local Sports Organizations (LSO) and Provincial Sport Organizations (PSO) that affect their ability to bid and host sporting events. There is limited capacity (knowledge, resources and time) to prepare a hosting bid or to organize and manage all aspects of hosting an event. While DSJ supports the bid process, there is currently no organizational support to provide guidance for logistics and other critical supports and this creates a significant gap in the transition from event win to actual hosting. Local organizing groups need to understand the linkage of their event to their surrounding community and how working together with local businesses (e.g. food and beverage) can have a mutual benefit.[52]
- Infrastructure: There is a need for the development of appropriate support infrastructure and facilities that will meet minimum standards for hosting national and international events. For most sports, there is a lack of high performance facilities that can accommodate elevated levels of competition, and for the venues that can, they have limited access due to scheduling or a prohibitive cost. Existing facilities are aging and lack modern amenities. NL will be hosting the Canada Summer Games in 2025 and this will provide an opportunity to invest strategically in sport infrastructure for the future.[53] The most notable difference between the development of infrastructure for recreation vs. sport hosting is that recreational facilities tend to be dispersed broadly into distinct neighbourhoods or regions such that local populations will have easy and equal access. For the purposes of hosting, facilities and support infrastructure need to be clustered to maximize logistic synergies and minimize additional financial hosting obligations, such as transportation. Other considerations include the availability of suitable spectator seating facilities that can adapt to a variety of similar sports, (volleyball, badminton, basketball, gymnastic, etc.), have appropriate lighting on outdoor fields, available prep rooms for athletes and coaches, box office facilities and a relative proximity to accommodations.
- Funding Mechanisms: Dedicated and adequate funding mechanisms are required to support key elements of the sport strategy including, support for developing bids, event hosting and developing capacity. The cost to host events in the region is more expensive compared to other

[51] Sport Tourism Event Partnership. Sport Tourism Strategy, May 2012.
[52] Ibid. Pgs. 7, 28, 33
[53] Ibid. Pgs. 8, 32, 59, 65

mainland jurisdictions due to the increased cost of travel and accommodations. Some competing destinations offer a variety of subsidies to support sport tourism events, including grants, waiver of facility rental and maintenance fees, sponsorship for individual event components, waivers on parking or other like fees or direct funding.[54]

Implications/Considerations

- Against the backdrop of stiff competition, suppliers to the MC&IT market must enhance their salesmanship and produce proposals that are more professional and respond to specified timelines;
- Planners are looking for creative ideas for staging, entertainment, off-sites events and activities therefore DMC must enhance their offering by providing more creative options that change frequently for planners to consider the NEA region;
- While there are opportunities for delegates to enjoy pre/post experiences, operators in the surrounding communities have an opportunity to secure more MC&IT business by increasing the options and enhancing the experiences offered and therefore increasing the amount they can charge;
- With limited off-site venues and locations for opening receptions etc. development of proposed new venues (Flake House, Masonic Temple, others) should be fast tracked in order to help close the sale (lack of venues negatively impact the regions ability to compete);
- Surrounding communities who have made investments in MC&IT infrastructure should focus on attracting local meetings that require limited space and services, as well as overnight accommodations;
- For sport and event business to grow, DSJ has identified gaps around capacity building and funding mechanisms that must be addressed, therefore steps should be taken to prioritize what needs to be done, by when and by who;

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 37: Activity-Based Tourism Businesses in the Destination

Activity-Based Companies	**# Of Visitor Opportunities**	**Seasonality (INFORMATION NOT PROVIDED FOR ALL ASSETS)**		
		% Year Round	**% 6 months + operation**	**% High season only**
Total Number of Companies	**29**	**36%**	**16%**	**48%**
Angling	1	-	100%	-

[54] Ibis. Pgs. 5, 20

Bird Watching	1		-	100%
Bird Watching Boat Tours	8	27%	-	73%
Cross-country Skiing	1	-	-	100%
Cross Country Skiing Tours	0	-	-	-
Diving and Snorkeling	2	-	-	100%
General Sightseeing	11	64%	35%	1%
Hiking and Walking	4	-	-	100%
Iceberg Watching	4	-	-	100%
Iceberg Watching – Boat Tour	9	2%	1%	55%
Learning Vacation	2	2%	1%	55%
Multi-Adventure Tours	1	75%	-	25%
Nature and Wilderness	8	45%	3%	1%
Photography	6	50%	25%	25%
Recreational Fishing Boat Tour	3	34%	33%	33%
RV Tours	1	100%	-	-
Sea Kayaking	3	-	-	100%
Snowshoeing	1	-	-	100%
Step On Guide	2	100%	-	-
Tour Package	5	50%	12%	38%
Tuna Fishing	1	-	-	-
Whale Watching	4	67%	-	33%
Whale Watching Boat Tour	11	-	100%*	
Zip Lining	1	100%		

Note 1: Not all activities offered in the NEA region fit into the categories captured in the TDVAA.

Note 2: Determining the exact seasonality of every product, with every company was beyond the scope of the study. Rather, the seasonality percentages represent when the companies offering the activity operate.

Table 38: Characteristics of the Activity-Based Companies

Activity Based Companies Characteristics	# Of Assets	% Of Assets	Price Range
Program Length			
1 hour programs (or less)	2	6%	$10-$15
2 – 3 hour programs	16	52%	$20-$200
Half Day programs	5	15%	$55-$300
Full Day activities	6	19%	$70-$315
2 – 3 day excursions	2	6%	$380-$650
4 – 7 day excursions	6	19%	$709-$3,600
8 – 10 day excursions	3	10%	$2,395-$5,500
11 – 14 day excursions	1	3%	$3,780
Program Dynamics			
Single site-based activity	7	23%	
Multi-destination based activity	23	74%	
Guided	26	84%	
Self-discovery	5	16%	
Experience Dynamics (Answered to the best of the data collectors' ability)			
Educational	21	68%	
Physical	13	42%	
Social	3	10%	
Spiritual	4	13%	
Connects you to the place	22	71%	
Connects you to the people	9	29%	
Connects you to the culture	18	58%	
Engages the senses	18	58%	
Interactive/hands-on engagement	10	32%	
Unique to Newfoundland & Labrador	22	71%	
Behind-the-scenes experience	3	10%	
Skill			
No skill required (e.g. never kayaked)	19	61%	
Some skill required (e.g. paddled a few times, know a bit about kayaking)	9	29%	
Highly skilled requirements (e.g. certified kayaker).	8	26%	
Availability			
Sell direct to travellers	25	81%	
Packaged Independent Travel options	0	0	
Group Travel Options	4	13%	

Key Findings

- There are 29 activity-based companies offering activity-based tourism opportunities, 36% operate year round, 48% operate in high season only (Jun to Sept) and 16% operate at least six months of the year;
- The most prevalent type of activities offered by the companies includes:
    - Whale watching boat tours (11)
    - Iceberg watching boat tours (9)
    - Nature and wilderness tours (8)
    - Bird watching boat tours (8)
- Three of NL's eight CTC Canadian Signature Experiences are located in the NEA region:
    - The Iceberg Quest – Experience the Wonder Iceberg Tours
    - Whale Close Encounter Tour: Snorkel with Whales – Ocean Quest Inc.
    - Legendary Whale Wonders – Stan Cook Sea Kayak Adventures
- The range of price points ensures guests with varying degrees of 'willingness to pay' have options from half day tours available at $55 - $300, to $70 - $315 for full day tours, and four to 10-day excursion ranging from $709 - $5,500; and
- The visitor experience dynamics are aligned with what travellers are seeking: 71% offer a unique NL experience, 71% connect to a sense of place, 58% engage the senses and provide interactive activities, and 68% are educational.

Implications/Considerations

- Activity-based businesses provide a wide range of high season natural outdoor experiences for visitors to choose from. These businesses can facilitate a NL rural, coastal experience in very close proximity to the city and all it has to offer;
- To ensure these tourism assets are fully leveraged and optimized operators must offer packaged experiences for leisure travellers and flexible day and half-day opportunities for business travellers, convention delegates and sports tourism participants. Attention should be directed at leveraging activity-based assets that are available in shoulder seasons, especially May, June, September and October;
- Continually refreshing the product offered and encouraging more diversified experiences will help enhance the revenue opportunities from repeat visitors to St. John's; and
- Growth in business and revenue for core activity-based experiences (whale, bird, iceberg watching and kayaking, for example) will come as operators enhance their basic offer, and add enhanced, higher-end experiences that support higher fees.

PEOPLE/PROGRAM BASED TOURISM BUSINESSES

PB1: The destination has program/people-based businesses with experiential providers contributing to the visitor experience in the destination. [YES]

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

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

Table 39: Destination's Program-Based Companies

Program-Based Companies	# of Companies	Seasonality		
		% Year Round	% 6 months + operation	% high season only
Total number of companies *	**7**	**14%**	**-**	**86%**
Storytellers	5			
Artisans (Crafts, Quilters, Painters)	2			
Musicians	5			

Note: The information in this table was gathered by the data collection team as TDMS does not current track this information. Some of the companies have more than one type of people/program asset.

Table 40: Festivals and Event Statistics for the Destination

Festival & Events		Length			
		% 1-day	% 2-3 day	% 4-7 days	% 1 week +
Total Number of Festivals and Events	68	31%	21%	15%	12%

Note: Lengths of durations were not reported for all events

Table 41: Festivals and Event Types

Types of Festivals Events	# Of Events
Community Celebrations	51
Cultural Experience	26
Historical/Cultural Experience	8
Music	28
Performing Arts	19
Sports and Recreation	13
Winter	8

Key Findings

- The data from the NEA region suggests there are not very many program/people-based tourism assets, however, through the industry consultation process stakeholders suggested there were dozens of individuals who would align with this tourism asset type. This remains a difficult tourism category to capture as TDMS does not track this element as a tourism asset, but this study is the first step in bringing these visitor opportunities, plus business-to-business opportunities to the forefront in order to support the notion that visitors are seeking the connection to local, authentic people and experiences when they travel;
- At present, there is no one organization that helps connect these individuals to the tourism industry even though it is viewed by many that this is an essential part of NL's and NEA visitor experience;
- There are examples of storytellers in the surrounding communities of CBS (Manuels River Interpretation Centre), Bell Island (Lighthouse Keeper tours), Petty Harbour (Fishing for Success);

- The NEA region has a diverse array of festivals and events. Of the 68 recorded events; 51 are community celebrations and 26 are culturally-based and 28 music-based;
- One to three-day events are most common and therefore, have opportunity to attract guests from outside NEA, 27% of events run four to seven days or longer which suggests there is a chance to attract non-resident travellers as the number of days the event is happening is extended; and
- Attendance data is not consistently tracked by all Festivals / Events but from the information available, community festivals range from 50 people for smaller community events to thousands for the larger events, such as the George Street Festival, Kelligrews Soiree and the Newfoundland and Labrador Folk Festival.

Implications/Considerations

- The reported, but yet to be categorized program- and people-based tourism assets in the NEA region, can connect visitors to the locals and their way of life and contribute to the quality and memorability of the NEA visitor experience. This could also be said for the festivals and events offered in the region.
- By tapping into these “unseen” resources, there is an opportunity to catalogue the experiences offered in order to promote them and generate added revenue for the asset by charging program fees for the experience. The lack of an inventory limits the ability for organizations to find unique partners that will add the special character of NL to an event, function or program;
- This is an underdeveloped opportunity in the NEA region and the entire province; it should be better leveraged as a way to share the stories of the people and place, while at the same time generating new revenue streams;
- Festivals that have provincial critical acclaim, last more than two days, and attract visitors from away should be featured as primary reasons to visit the region; this will provide greater appeal for the region and for visitors from away to motivate a trip;
- Stakeholders in other regions indicated that future tourism studies of this nature should include the NL Arts Council and NL Craft Councils databases as they have lists of artisans located throughout the province. Further, efforts should be made to integrate and align these organizations and people with the tourism industry to increase the opportunities for visitors and businesses alike; and
- BTCRD could explore adding this new tourism asset category into TDMS with defined variables to begin to capture and promote those that offer experiences directly to visitors, as well as consider a Business to Business (B2B) category so that operators can easily identify individuals they can partner or package with to enhance the guest experience.

Tourism Demand Generators/Seasonality and Visitation Motivators

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 42: Seasonality

Type	Open Year Round	High Season Only	Open at least 6 months
Culture-Heritage Assets	74%	10%	16%
Nature-Based Assets	70%	11%	19%
Activity-Based Businesses	49%	46%	15%
Trails-Routes	85%	6%	9%
Man-made Attractions	45%	18%	36%
Retail	83%	6%	11%
Restaurants	95%	3%	2%

Table 43: Destination's Primary Tourism Demand Generators

Demand Generators - Primary	Community/Location
Signal Hill National Historic Site of Canada	St. John’s
The Rooms	St. John’s
Cape Spear National Historic Site of Canada	St. John’s
East Coast Trail	St. John’s
George Street Festival	St. John’s
Witless Bay Ecological Reserve	Witless Bay

Note: This list represents a subjective assessment, grounded in data on trip motivations, visitation stats, critical acclaim, conventional wisdom, and suggestions by DSJ staff and the BTCRD staff.

Definition: Iconic places, attractions and activities that are the ‘main reason’ domestic AND international travellers choose a destination. They have a distinct competitive positioning and visitor appeal and by their nature bring business to others in the region.

Table 44: Destination's Secondary Demand Generators

Demand Generators - Secondary	Community/Location
Bell Island Community Museum & Number 2 Mine Tour	Bell Island
Commissariat Provincial Historic Site	St. John’s
Newman Wine Vaults Provincial Historic Site	St. John’s
Quidi Vidi Village Plantation	St. John’s
Railway Coastal Museum	St. John’s
Botanical Garden Memorial University	St. John’s
Spirit of Newfoundland Productions Dinner & Show	St. John’s
Harbourside Park	St. John’s
The Grand Concourse	St. John’s
Johnson Geo Centre	St. John’s
Petty Harbour Mini Aquarium	Petty Harbour-Maddox Cove
T'Railway Provincial Park	Conception Bay South
Manuels River Trail System	Conception Bay South

Key Findings

- The NEA region has a long list of tourism demand generators that have appeal to non-resident travellers including two National and Provincial Historic sites as well as the well-known East Coast Trail; these sites are all within close proximity to the visitor services found in St. John’s (accommodations, restaurants, retail shops and the airport);
- These assets have appeal to all market segment (leisure, travel trade, MC&IT, sport tourism); and The region’s supporting attractors can be found both in and outside of the City of St. John’s.

Implications/Considerations

- By positioning the region as a “hub and spoke” destination, visitors will understand that they can take advantage of a variety of interesting urban and rural sites that are synonymous with a NL experience but all within a short distance of downtown St. John’s; and
- Ensuring visitors understand the long list of things to see and do in the NEA region before they finalize their trip planning is important so they can plan enough time to see the various sites – this will go a long way to extend the length of stay of leisure travellers.

4.2.4 Sustainability Dimension

4. This section provides a high-level assessment of North East Avalon's 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 Environnemental 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. [ALMOST]

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

HR3: Where labour pool constraints are occurring there is evidence of plans or strategies to address this challenge. [NO]

HR4: There is evidence the destination is making investments in tourism industry training and tourism business development within the last five years (2010 – 2015). [ALMOST]

HR5: There is evidence of succession planning for tourism businesses. [NO]

Table 45: Full-time Tourism Jobs in NL

Full Time Jobs[55]	**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

[55] Hendry, Jennifer (2012, Mar.). *Attracting and Retaining Tourism Talent*, *Current Labour Issues and Future Challenges.* A CTDHR research presentation prepared for the HNL Board of Directors Meeting.

Key Findings

- Human resource conversations acknowledge that finding year-round workers can be a challenge. A "revolving door" scenario exists in St. John's where front line hourly hospitality workers can move from business to business if they can get a higher wage; this is particularly true in the food and beverage and accommodation sectors;
- Given that the workforce in the surrounding communities is made up of individuals who commute to higher paying jobs in St. John's, Economic Development officers reported businesses in food service find it difficult to hire and retain quality hourly workers;
- Operators in surrounding communities who are indirectly connected to tourism (retailers, restaurateurs) do not see themselves in the tourism business and therefore, service all customers as locals and perhaps missing opportunities to increase spend or add to the visitor experience;
- There are a number of examples where labour and skills development is available to the tourism industry. These include:
    - HNL, DMO, City of St. John's, Board of Trade, workshops (safety, service, market readiness, online navigation);
    - The Bonavista Institute for Cultural Tourism (culinary, partnerships, cultural tourism);
    - The Gros Morne Institute for Sustainable Tourism (experiential travel, adventure tourism, sustainability);
    - Regional courses offered by Community Business Development Corporations (accounting, bookkeeping, supply chain, succession planning);
    - SmartForceNL – CoursePark (Online sponsored/subsidized learning by the NL government); and the
    - College of the North Atlantic offers a range of programs from short tourism training courses to a two-year diploma in hospitality tourism management.
- There is some evidence of succession planning, for example BTCRD's BR&E program, tourism businesses working with Community Business Development Corporations, Business Development Bank of Canada and other groups.

Implications/Considerations

- Tourism related human resource challenges should recognize the efforts being made currently by partners including, HNL, DSJ, BTCRD, ACOA, GMIST, Bonavista Institute for Cultural Tourism, College of the North Atlantic, surrounding communities Economic Development Depts., St. John's Board of Trade, St. John's Chamber of Commerce among others;
- Exploring how to entice older workers to consider tourism as a semi-retirement/retired work option is important as they are active, experienced and good workers with a strong work ethic, yet they have different needs and motivations for working in later life. The generational mix of a staff can drive benefits to the visitor and the business for each age cohort brings different talents, passion, and community understanding to the job; and
- The Targeted Older Workers initiative[56] is a program that could reach and engage the semi-retired, retiring Baby-Boomer population that could be a real asset to the tourism industry.

[56] Government of Newfoundland & Labrador Advanced Education and Skills. (2014). *Targeted initiative for older workers. Request for proposals.* A government funding program to support NL's unemployed older workers.

SALES AND MARKETING PRACTICES

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

SM2: The destination's 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. [YES]

SM3: The destination contributes to a favorable market presence through its iconic and primary demand generators. (e.g. are the attractions that drive visitation are being used to market the province). [YES]

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

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

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

SM7: There is market demand for the range of tourism offerings that the destination is offering. [YES]

Table 46: Tour / Receptive Operators Serving the NEA Region

Domestic Tour Operators	American / International Tour Operators
• McCarthy's Party (local receptive tour operator – St. John's) • Wildland Tours (local receptive tour operator – St. John's) • Atlantic Tours (Atlantic Canada receptive tour operator – based in Halifax) • Denure Tours (Lindsay, ON) • Senior Tours (Toronto, ON) • Hanover Holidays (Hanover, ON) • Groupe Voyage Quebec (Quebec City) • Routes Adventures (Kingston, ON) • Canadian Tour International (Toronto, ON) • Nagel Tours (Edmonton, AB) • Fehrway Tours (Winnipeg, MN) • Great Canadian Holidays (Kitchener, ON) • Eagle Eye Tours (Windemere, BC) • Westworld Tours (Regina, SK) • Anderson Vacations (Calgary) **FIT Tour Operators** • Jonview Canada • Maxxim Vacations • Canadavac • Vision Atlantic • Tourico Holidays • Discover Holidays	**American** • Globus Vacations (Littleton, Colorado) • Collete Vacations (Pawtucket, RI) • Road Scholar (Boston, MA) • Adventure Caravans (Texas) **International** • Titan Travel (UK) • Bridge and Wickers (UK)

Key Findings

- 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. Operators must take care and diligence when completing their TDMS profile each year so that visitors have an accurate and up-to-date understanding of the business. Creating and presenting packages that can be sold via the provincial website is also strongly recommended.
- DSJ functions as a traditional destination marketing organization (DMO) focused on leading the sales and promotional efforts of the greater St. John's area, targeting major meetings, conventions and incentive travel (MC&IT); sport and cultural events, leisure travel and group tours. DSJ and representatives from the surrounding communities work together;
- DSJ staff and the economic development representatives from the municipalities look for ways to partner;
- Tourism Bell Island is also a DMO, they represent the industry on the island and have been focused primarily on product and experience development versus marketing and sales; they have three areas of activity – tourism, agriculture tourism and marine development;
- DSJ focuses on a number of tourism market segments that include two leisure markets: group tour / motor coach and the Fully Independent Traveller (FIT) markets, Event and Sport tourism markets and the MC&IT market;
- DSJ attended the following leisure or travel trade marketplaces in Canada, US and Europe in 2105:
    - National Tour Association; New Orleans (January)

  - Rendezvous Canada; Niagara Falls (May)
  - Travel Alliance Partnership; Oklahoma City (June)
  - Ontario Motor Coach Association; London, ON (November)
  - Holiday World Show; Dublin, Ireland (January)
  - World Travel Market; London, England (November)
- DSJ and its partners also work with a number of inbound tour operators and local receptive operators (see Table 46);
- MC&IT is a primary area of focus, especially in light of the expanded convention centre which opened in May 2016, DSJ and its sales team employed a variety of tactics to secure RFPs for future meetings;
- Event Tourism includes both sport and cultural events; however, DSJ's primary focus is on sport;
- Having experienced sellers in the market place is critical to meeting the ever increasing demands and expectations of professional meeting planners, event managers and group tour operators. Third party meeting planners, in particular, demand fast turn arounds on requests for proposals (RFPs) and expect very comprehensive, professional and client-centred responses carried out with a sense of urgency.

Implications/Considerations

- The sales and marketing practices being implemented effectively position the region in the markets where it competes;
- Collaboration is evident with DSJ leading the way in partnership with BTCRD, sector and business associations and with public and private sector operators;
- While DSJ goes to market with compelling reasons to visit, operators must continue to develop enhanced experiences that meet the needs of today's travellers so DSJ's efforts will generate growing levels of visitation;
- DSJ goes to market using a variety of social media strategies, however, operators have been reluctant to provide interesting content to populate these highly interactive media channels; and
- In order to be successful in the competitive MC&IT market destinations must be responsive to sales leads and develop proposals that compel buyers to seriously consider the destination; DSJ reports that sales proposals from accommodators could be more complete and professional and delivered in a timelier manner.

Environmental/Social Practices

ESP 1: There is evidence in the destination 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 destination that track the impact of human use on the assets. [ALMOST]

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

- Little emerged relative to this category in the NEA region, as was found in other regions, which could be because there are limited tourism resource management practices in NL. It does not imply that good practices are not occurring with individual businesses or at the community level, rather nothing was provided in the form of documentation, nor did discussions emerge regarding potential topics such as environmental stewardship, human-use impact, environmental monitoring or the impact of tourism or tourism issues related to the environment and host communities;

- Increasingly, clients are looking to destinations to demonstrate “greening” initiatives. For hotels, this means not using water bottles, serving condiments in glass dishes instead of small packets, using meeting room tables designed to be used without linen table cloths to reduce washing, reduction strategies in guest rooms for linen and bath towels or environmentally friendly bath soaps and shampoos. Some tour operators and attractions have also demonstrated waste reduction. Some downtown shops are using paper bags;
- Meeting delegates, business travellers and sporting event participants/spectators are in St. John’s 12 months of the year yet the City of St. John’s does not start its spring street cleaning until May. Conferences start arriving in April and continue into November, with the occasional conference in January - March. Streets and alleys in the downtown area are covered with litter, creating a negative impression for both residents and visitors to the City; graffiti is also abundant in the downtown area;
- There are currently limited bike rentals and no scooter rentals in the NEA region;
- Responsible practices also need to be addressed when designing new experiences and building partnerships with contract guides/guides for hire;
- In Torbay, an old contaminated factory site has had implications on the town water supply, a large area of the town is not developable or has restricted development because of water related issues;
- A similar issue exists for many communities along the coast; this is thought to keep towns small, with little or no development planned for the future; and
- Because of sub-division development in the surrounding communities, traffic to and from St. John’s is an issue especially during morning and afternoon commuting times.

Implications/Considerations

- The visitor appeal for the NEA region is a combination of urban- and nature-based, responsible tourism practices and environmental stewardship should be practiced at all times to ensure the preservation of both the urban and the natural environment;
- Operators, especially those wanting to attract the MC&IT and travel trade markets must invest in “greening initiatives” not only to secure business but to positively impact the environment;
- Programs that monitor tourism activity and its impact on natural resources and the environment should be initiated; and
- Traffic congestion and parking limitations negatively impact the visitor’s experience, therefore, introducing enhanced public transportation options and more frequent hop-on-hop-off bus service for attractions could have positive results.

Strategic Planning & Investment

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

SPI2: The destination has a current strategy in place to guide their investments and product development activities. [NO]

SPI3: The destination 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 destination. [YES]

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

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

Key Findings

- There is evidence that the region is aware of the *Vision 2020* provincial tourism strategy and that this is a foundational strategy that guides tourism management activity;
- There was evidence that tourism is included in the City of St. John's and the surrounding community's municipal plans; there were recommendations for growing tourism in several of the plans and investments have been made from levels of government to positively impact tourism;
- There was no evidence of strategies that specifically guide tourism investment and product development;
- No one organization is leading tourism product development in the region and therefore, there is an array of activity taking place that appears to be fragmented, lacking cohesion and vision;
- The City of St. John's has experienced budget reductions for fiscal 2015 / 2016; these reductions have impacted tourism services that the city delivers:
    - Reduction in staff that once had tourism in their job description,
    - Reduced VIC hours of operation – only open May – Sept and for special events,
    - Support for travel trade and travel media Fams have been eliminated
    - Cruise activity limited to sales with on-site welcome services no longer provided,
    - Tourism Industry Coordinator role eliminated,
    - No allocation of tourism resources for DDP implementation.

Implications/Considerations

- When it comes to tourism development and related strategic planning, the region must take proactive steps to establish a cohesive and holistic approach for tourism destination development; the NEA DDP should form the foundation for future activities;
- The region must establish a leadership group to identify what DDP implementation will look like, identifying roles and responsibilities for future tourism development; and
- Steps must be taken to address the service gaps created by reduced levels of support by the City of St. John's.

4.2.5 Measures of Success

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

KPI1: The commercial accommodations base in the destination has average year-round occupancy (62.1%, 2015) par or above the provincial average of 50.4% (2015). [YES]

KPI2: The destination offers year-round tourism opportunities for guests. [YES]

KPI3: Occupancy from commercial accommodations is spread throughout the year in the destination. [YES]

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 BTCRD tourism research division routinely gathers a number of tourism statistics, but availability of regional and sub-regional indicators is limited due to data collection methodologies for the various indicators. 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 tourism performance using a number of other performance indicators.

Table 47: Occupancy for Economic Zones 19 (NEA Region)

ROOFED ACCOMMODATION OCCUPANCY - Economic Zone 19						
Jan - Dec ALL PROPERTIES	**2011**	**2012**	**2013**	**2014**	**2015**	**% / Point Chg. 2014/15**
Occupancy rate	69.5	70.7	73.9	68.2	62.1	-6.1 Pts
Room nights available	878,805	852,025	837,342	900,589	951,031	5.6
Room nights sold	611,110	602,563	618,949	614,474	590,724	-3.8
ADR	$128.59	$134.13	$141.33	$147.50	145.99	-1.0
Jan - Dec Hotels/Motels/Resorts/Suites						
Occupancy rate	71.2	72.2	75.1	68.9	63.9	-5.0 Pts
Room nights available	799,532	783,069	773,134	849,550	882,323	3.8
Room nights sold	569,419	565,020	580,249	585,653	564,235	-3.6
ADR	$129.39	$134.84	$142.08	$147.79	146.47	-0.9
Jan - Dec B&Bs/Inns						
Occupancy rate	52.1	54.3	60.1	55.8	47.5	-8.3 Pts
Room nights available	70,926	60,730	55,843	44,114	38,451	-12.8
Room nights sold	36,917	32,988	33,589	24,609	18,249	-25.8
ADR	$124.92	$131.39	$138.66	$148.64	159.34	7.1

Source; Accommodation Module; TDMS. Data provided by the Department of TCR on 26 Feb 2014. A manually compiled table.

Table 48: Provincial Occupancy 2009 - 2015

Year	Room Nights Available	Room Nights Sold	Occupancy Rate	Room Revenue	REVPAR	ADR
2015	2,771,399	1,398,220	50.45%	$188,432,937.08	$67.99	$134.77
2014	2,737,075	1,391,577	50.84%	$184,183,810.62	$67.29	$132.36
2013	2,663,558	1,374,240	51.59%	$175,403,994.45	$65.85	$127.64
2012	2,686,198	1,347,795	50.17%	$163,116,637.29	$60.72	$121.02
2011	2,649,413	1,342,997	50.69%	$155,282,408.96	$58.61	$115.62
2010	2,649,948	1,327,522	50.12%	$147,906,026.18	$55.81	$111.42
2009	2,611,716	1,256,846	48.12%	$135,546,144.76	$51.89	$107.85
2015 by Quarter						
Jan-Mar	624,981	240,562	38.49%	$29,868,132.40	$47.79	$124.16
Apr-Jun	722,161	351,804	48.72%	$47,188.851.37	$65.34	$134.13
Jul-Sep	782,136	528,283	67.54%	$75,072,920.25	$95.98	$142.11
Nov-Dec	642,121	277,571	43.23%	$36,303,033.06	$56.54	$130.79
Source: Accommodation Component of TDMS II. Data for 2015 is based on information received and entered into TDMS as of April 29, 2016. Data is subject to revision pending further reporting by operators.						

Key Findings

- 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 BTCRD tourism research division routinely gathers a number of tourism statistics but availability of regional and sub-regional indicators is limited due to data collection methodologies for the various indicators regional/sub-regional results are limited by available sources;
- DSJ monitors results based on total room nights sold overall and within its key target markets – the meetings and conventions market; the leisure market; and the sport and cultural events market. These results provide an indicator of the overall impact each market has on its members and the region as a whole
- DSJ reports total room nights sold in 2015 decreased by 3% (18,581 room nights) from 2014 and ended with 584,459 room nights. Average room rate decreased slightly from $150.37 to $149.07. The resulting economic impact decreased from $90,621,196 in 2014 to $87,072,180 in 2015;
- With the St. John's Convention Centre being closed for renovations in 2015, the year ended with a total of 82 events held in the city, down from 99 the previous year. The total number of conference attendees visiting the region likewise decreased from 24,490 to 21,215 and the number of room nights was down by 18% to 30,562;
- DSJ reports that sporting events represented 5,611 attendees in 2015 compared to 2,830 in 2014 and 7,474 room nights compared to 5,121 in 2014. 2015 was a good year for DSJ with notable events that included Canadian Powerlifting Union Nationals, National Slo Pitch, Eastern Canadian Softball Championships, Canadian Ball Hockey Eastern Championships, National Ball Hockey Championships, Atlantic Cup Challenge Softball, Atlantic Synchronized Swimming Championships, Grand Slam of Curling and Boys & Girls National Soccer;
- The group tour and leisure travel markets rebounded in 2015; the number of room nights sold increased to 7,380 which is a 20% increase from 6,159 in 2014;
- The City of St. John's in its 2016 budget estimated a reduction of 12% in accommodation taxes compared to 2015, going from $3,871,000 to $3,400,000;
- The NEA shoulder season for each market segment is different; MCIT sector: April and November, leisure market: May and October, Sporting events: all four seasons.

Implications/Considerations

- While 2015 performance was off, DSJ reported in their 2015 Annual report that “2016 is 12% ahead of 2015’s booking pace. Sales activities will continue to be aggressive with 18 national/international tradeshows/conferences/events/sales missions and two DSJ hosted FAMs.
- In November 2016, St. John’s will host the Professional Convention Management Association of Canada which will bring an audience of approximately 450 MC&IT industry professionals to St. John’s.
- Efforts will continue in current markets and will expand further into the UK market to increase future room nights sold in our destination.
- Tourism operators must be made aware of the demand periods and the experiential needs of the traveller so they can develop experiences that meet the traveller’s expectations. The demographic nuances of each market segment (MCIT, Sport and Travel Trade) must be reflected in the development plans for infrastructure and experiences to maximize tourism revenues for the region;
- As DSJ uses creative tactics to expand into its shoulder seasons for MCIT, sport and leisure travel markets, other regional partners providing unique experiences and services (local attractions, historic sites, museums, VICs, performance centres, Trolley, transportation providers), must expand their season as well;
- The Winter Action (#WinterAction) and the new Winter Recreation Events for the City of St. John’s may result in activities to attract groups in the need periods of the destination;

5. Implementation Plan

What Does Implementation Look Like in the North East Avalon Region?

The true value of a Destination Development Planning process and the subsequent document produced is only realized when proactive and timely implementation takes place and all key stakeholders begin to see results.

Ensuring a realistic implementation plan is developed and adopted for the NEA TDVAA is critical for tourism operators, funding partners, and government entities that support tourism development. It will be this collaboration that takes action towards the implementation of immediate short-term opportunities and begin to forecast for the longer-term activities.

This is the fifth and final regional TDVAA project to be completed. The scope of the consultants' responsibilities for the TDVAA process in the NEA region concludes with these development recommendations and implementation guidelines. Following acceptance of the NEA regional TDVAA report, a customized Opportunity Management (OM) process will be led by BTCRD that will help prioritize longer-term recommendations in the context of a proactive implementation strategy.

Head Start Implementation

Implementation of short-term actionable recommendations, the "low hanging fruit" opportunities, can begin at once. These recommendations have been flagged or designated in the report with a symbol. These recommendations have also been flagged by responsibility and at the conclusion of this section a chart clearly outlines each opportunity and the organization responsible for implementation.

Beyond the immediate action items, the next step for implementing the remaining recommendations is to work through the OM process with key stakeholders to prioritize these recommendations. All parties involved in the NEA region's TDVAA process can then understand and plan for the impact on individual work-plans, program funds, budgets and staff resources required in order to implement the identified recommendations.

The NL Tourism Board is ultimately accountable for creating and overseeing a manageable and realistic implementation plan, facilitating implementation, supporting and monitoring the process, and evaluating progress related to contribution and achievement of the *Vision 2020* goals.

Understanding the Opportunity Management (OM) Process

OM is a dynamic process that leads to tangible outcomes with ongoing evaluation, from idea generation to initiative completion. It is not a module or event, rather it is a disciplined process, focused on generating results over the short and long-term.

Benefits and Outcomes:

- Sets long and short-term priorities;
- Identifies a means to use financial, technical & human resources wisely;
- Guides the strategic focus of staff and volunteer efforts towards tangible goals;
- Helps identify when to stop pursuing an idea and move on to the next one; and
- Provides a solid foundation to communicate priorities to stakeholders and helps manage expectations.

The OM Process - *Doing the Right Things & Doing Them Right*
Figure 7 illustrates the funnel with the stages and gates TDVAA recommendations will be examined through to get approval and buy-in to implementation.

The process involves the following steps:

Phase 1 – Opportunity Identification (E.g. Review of the TDVAA Recommendations)

Phase 2 – Recognizing Opportunities (E.g. Prioritizing mid-term and long-term projects)

- Initial Screening
- Secondary Assessment (Matrix)
- Balanced Approach Criteria

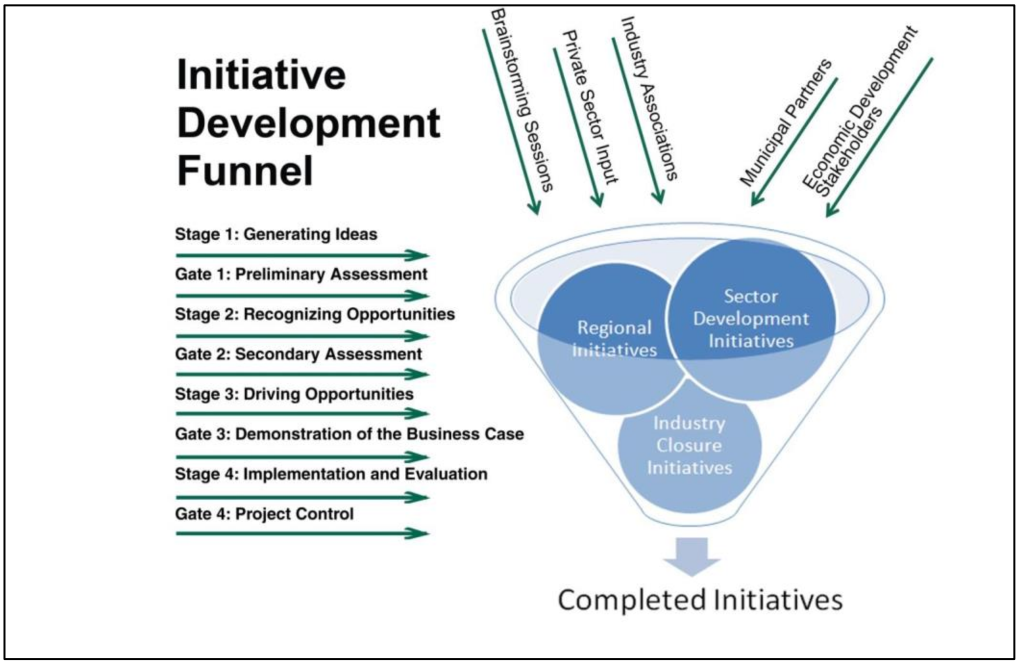
Phase 3 – Driving Opportunities

- Assigning leads, accountability, action plans and project management

Phase 4 – Monitoring & Evaluation

- Advance, Rework or Kill?

Figure 5: OM Initiative Development Funnel - sample



At each gate of the process, the merit of each recommendation is examined to determine its merit for resource allocation. Decision criteria are the factors used to help determine the likelihood of successful implementation. These should be established up front, be weighted (%), assigned points (1-5) using a predetermined scoring system with weights and points that are determined by identified participants at the outset. Each idea, and the ensuing strategies and tactics, must pass through a gate, there are three options at each gate: (1) Advance; (2) Rework; or (3) Kill.

ADVANCING IMPLEMENTATION

Under the leadership of the NL Tourism Board, the NEA TDVAA Advisory Committee, the Primary Steering Committee, HNL, BTCRD, ACOA and tourism operators all have a role to play in various implementation activities to ensure implementation is successful. Some recommendations principally impact government partners, others are operator specific and many require a collective effort by private, public and not-for-profit partners. Tourism succeeds when collaboration trumps self-interest, funding partners support priority initiatives, training support is provided when needed and realistic time frames are set to achieve outcomes. Done well, the collective competitiveness and appeal of the destination will increase generating benefits for tourism businesses and communities. Table 49 proposes a launch sequence for consideration.

Table 49: TDVAA Implementation Launch

Task	Detail	Timing	Resp.
NL Tourism Board, HNL Board, BTCRD, PSC approves/adopts/ accepts the study and its recommendations	HNL/BTCRD to facilitate the approval process The HNL management team presents the study to their Board, BTCRD, ACOA for acceptance, approval and adoption	July 2016	HNL, BTCRD, PSC
Head start recommendation implementation begins spearheaded by those identified as responsible for each recommendation	Recommendations marked with a symbol are considered ready for implementation, those identified can begin acting on these recommendations at once	Sept 2016	Operators, HNL, ACOA, BTCRD
BTCRD spearheads the OM process to prioritize the long-term recommendations	BTCRD facilitates a prioritization process with the ACOA, HNL, PSC and their Advisory Committee. NL Tourism Board is accountable for implementation; keep them in the loop	Fall 2016	HNL, PSC, BTCRD, Tourism Board Mgr.
Budget implications for different organizations	Start of fiscal year, ability to incorporate	Fall 2016/Winter 2017	HNL, PSC, BTCRD, ACOA
Formalize Implementation Process For Province/HNL/Others	Develops implementation plan for high priority recommendations to be implemented by those other than operators as indicated through the OM process	**Fall 2016/Winter 2017**	ACOA, HNL, BTCRD, PSC
Provincial/HNL Others Implementation	Develop list of implementation plans and deliverables with accountability to the Tourism Board	Fall 2016/Winter 2017	HNL, BTCRD, PSC
Round One Implementation Roll Out	Monitor implementation activity, report quarterly on progress to Tourism Board, develop North East Avalon destination development report card to track activity and progress	Fall 2016/Winter 2017	HNL, BTCRD, PSC
Destination Development Advocacy	Where advocacy is required to affect destination development implementation plans develop specific recommendation advocacy strategies	On-going	HNL

IMPLEMENTATION TASK TEAMS

Many of the recommendations specific to the NEA region and its operators will be implemented by an *Implementation Task Team.* The benefactors (businesses/communities) who have a direct connection to the recommendation become the implementation task team and be comprised of individuals who have expertise, experience, interest in this recommendation and are the most likely proponents to act on and benefit from the work.

The NEA PSC would facilitate the formation of the implementation task teams and the development of a process with the teams. Specific strategies, timelines, deliverables and accountabilities will be set by the team. When necessary, the team, through the NEA region PSC, would draw in resources to aid in the steps of implementation.

PRIORITIZING THE RECOMMENDATIONS WITH ROLES AND RESPONSIBILITIES

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 NEA region in the immediate term, as well as over the long-term. They have been identified throughout Chapter 3 by the symbol: This was included to assist with planning and getting a head start on short-term actions, the *"low hanging fruit",* while the longer-term actions are discussed in the context of OM.

Table 50 highlights suggestions for a number of items that can begin immediately. They are organized by Finding. Note: in some cases, the recommendation has been edited for brevity, see full recommendation in the report.

Table 50: Head Start Recommendations

Finding	Action
2	**City of St. John's, NEA WC:** Given the considerable amount of infrastructure improvements planned or currently underway for the downtown core, there is opportunity to ensure these improvements will be done against the backdrop of not only what makes sense in addressing infrastructure deficiencies, but also in enhancing the visitors experience. Efforts must be made to enhance efficiency of city infrastructure but also incorporate functional and aesthetic enhancements that contribute to the visitor's experience. This includes incorporating enhancements that add to the ease for visitors to access tourism related businesses and services found in the city core. **City of St. John's, DSJ, Downtown Business Association, Operators:** To ensure the importance of visitors to the downtown core is taken into consideration during discussions regarding downtown improvements, tourism organizations and operators who have a vested interest in seeing enhancements with the visitor in mind, must organize, participate and contribute to the planning process. Consider striking a Task Force whose mandate is to liaise with city staff to provide insight and input in relation to planned infrastructure improvements.
3	**DSJ, Economic Development Departments-Surrounding Communities:** Leverage DSJ's desire to proactively tap into the expertise available in the surrounding community's economic development departments by establishing an annual business building planning process that identifies strategies to enhance the overall competiveness and appeal of a St. John's hub and spoke selling proposition. This should be a forward-looking approach rather than reactionary based on the opportunities that come along. Growth opportunities will be sourced from each of DSJ's market segments (leisure, travel trade, MC&IT and sports events) and will serve to enhance appeal by providing potential visitors with the best of NL in one region. When successful, this will extend length of stay and grow tourism revenues for the entire region.

4	**City of St. John's, George Street Association, Operators:** Implement the recommendations identified in the 2016 George Street 10 Step Action Plan as soon as possible.
5	**Operators:** Enhance current working relationships for the purpose of establishing a proactive approach for long-term collaboration and partnership to attract like visitors, cross promote, and develop compelling programming that complements one another's offering and fills the gaps during slower times of the year.
6	**Operators, DSJ, HNL, BTCRD:** Operators evaluate current offering, sales performance and capacity to determine if there is an opportunity to grow revenue by adding enhanced experiences that cater to specific market segments at specific times of their operating hours. If so, work with DSJ, BTCRD and HNL and take steps to understand today's more discerning customer, then align their desires with new programming that once developed, utilizes their expertise, the expertise of others and enhanced access to or understanding of the natural assets they currently leverage. Utilize the BTCRD Creating Experiences Guide to inform thinking.
8	**Operators:** Against the backdrop of changing market dynamics, operators must look at their businesses and the experiences, products and services they offer to ensure they are meeting the needs of all segments of the NEA region's visitor market. Each market segment has different needs; therefore, presenting the same experiences, products and services to each segment limits opportunities to close the sale at both at the individual business and destination level. Operators are encouraged to work with DSJ, BTCRD, Sport Tourism Event Partnership (STEP) and other government agencies to understand the nuance of each segment especially before making new investments in product development, marketing and sales. This will ensure an alignment with market needs and wants, as well as with development efforts of the broader region. **Accommodators:** Recruiting and retaining experienced sellers is critical to meeting the ever increasing demands and expectations of professional meeting planners, event managers and group tour operators. Third party meeting planners, in particular, demand fast turn arounds on requests for proposals and expect comprehensive, professional and client centered responses. As DSJ works on behalf of all accommodators and serves as the sales representative for all market segments and client groups, their success will be greatly enhanced if they can present potential buyers (leads) with compelling, competitive and timely sales proposals. Accommodators must take steps to improve the response time and quality of their proposals. **DSJ, Attractions, Heritage / Culture Sites, Activity Based Operators:** As DSJ uses creative sales and promotional tactics to expand into its shoulder seasons for the MCIT, sport and leisure travel markets, operators providing experiences and services (attractions, historic sites, museums, VICs, performance centres, transportation providers) for these market segments must expand their season as well. **DSJ, HNL, BTCRD:** To enhance sales effectiveness in the near and long-term, destination developers and marketers would be well served to deliver training designed to help operators understand changing market dynamics and how to be more effective at meeting the needs of today's travellers. Training should incorporate experience and product development, business collaboration techniques and effective proposal writing, among other things.
9	**City of St. John's, Taxi Operators / Ground Transportation Companies, Rental Car Companies, MetroBus, St. John's International Airport:** Take steps to continue the pleasant environment guests experience when they deplane their aircraft to outside the doors of the arrivals area. Address deficiencies such as inconsistent or non-existent public ground

	transportation options, rental car pick-up and drop-off areas, taxi availability during peak arrival times and late evening as well as taxi cleanliness, condition and availability of vehicle rentals during peak season.
11	**BTCRD, ACOA, HNL, NEA WG and Operators:** Prioritize, through the OM process, projects that have the greatest potential to attract non-resident travellers with strong consideration to those that will drive visitation to St. John's, as well as the surrounding communities. In addition, give priority to projects that reinforce the regions "urban on the edge of nature" positioning. Take into consideration the wants and needs of the diverse market segments that currently visit the region.
12	**HNL, Operators:** Exploring how to entice older workers to consider tourism as a semi-retirement/retired work option especially in the accommodations, retail and F&B sectors is important as they are active, experienced and good workers with a strong work ethic, yet they have different needs and motivations for working in later life. The *Targeted Older Workers Initiative* is a program that could reach and engage the semi-retired, retiring baby-boomer population that could be a real asset to the tourism industry.
13	**DSJ, Surrounding Communities, HNL:** Extract from the TDVAA database the tourism businesses without a website, TripAdvisor page and/or Facebook account and invite them to invest in enhancing the reach of their business by using these distribution channels. DMO's could take the lead on connecting with businesses to explain the importance of this missed opportunity relative to why visitors use these sites as part of their trip planning and decision making process. HNL could develop three targeted one-day workshops that take an operator from a state of non-engagement, to understanding the relevance, how to invest, level of effort required to maintain a presence, conversation protocols expected by consumers, how to use these marketing tools. For TripAdvisor and Facebook specifically, operators should leave the workshop having created a basic web presence and learned the protocols and visitor expectations for each channel. The training must go beyond relevance and benefits and include 'hands-on keyboard' learning/doing. The Working Group can use the baseline data from the TDVAA to monitor uptake and improvements over the next two to three years. **Operators**: For businesses with a website, add experience descriptions, videos and photos of visitors engaged in activities that show potential visitors the type of experience they can anticipate. Ensure a call to action for direct sales is evident, and if working with the travel trade and/or travel media or would like to attract this type of interest, ensure information and a call to action is included on specific landing pages. Investigate online reservation systems, ensuring there is "how to get here" information.
14	**Operators:** BTCRD and RANL are in discussions to have food and beverage operators complete a Tourism Operator Profile form to become part of the provincial tourism marketing system. DSJ and surrounding communities can be instrumental in ensuring operators are aware of the opportunity when it is introduced and ensure everyone signs up. Operators will need to complete the forms ensuring the declarations they make on the form (e.g. regarding vegetarian, vegan, gluten etc.) are honest and will reflect what a visitor can enjoy at their establishment.

Appendices

Appendix 1: Contributing Stakeholders

The following individuals contributed to the TDVAA process for the NEA region.

Project Sponsor

Contracted the TDVAA and assumed overall management and budget responsibility for the project. They provided the link between the project managers and their Board of Directors or senior management staff. Appointed staff on the core project team include:

- Carol-Ann Gilliard, Chief Executive Officer, Hospitality Newfoundland and Labrador (2015), Director, Strategic Product, Department of Business, Tourism, Culture and Rural Development, Government of Newfoundland and Labrador (Dec 2015 – present);
- Craig Foley, Chief Executive Officer, Hospitality Newfoundland and Labrador (Jan 2016 to present)
- Lynn Taylor, NL Tourism Board Manager, NL Tourism Board;
- Scott Andrews, Manager Strategic Tourism Product Development, Department of Business, Tourism, Culture and Rural Development, Government of Newfoundland and Labrador and:
- Linette Moores, Marketing Partnerships and Industry Liaison, Department of Business, Tourism, Culture and Rural Development, Government of Newfoundland and Labrador.

Project Manager and Assessment Team

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

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

Primary Steering Committee – Project Leads

Oversaw the destination-based activities related to the TDVAA Industry Advisory Committee, stakeholder engagement, 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 BTCRD and HNL. They also provided the regional voice and perspectives important to the validation process, findings and ultimate recommendations. The NEA region team members were:

- Rhonda Hutton, Destination St. John's
- Cathy Duke, Destination St. John's
- Margaret Donavan, City of St. John's
- Deborah Cook, City of St. John's
- Krista Perry, Town of Conception Bay South
- Jennifer Penney, Town of Paradise
- Steve Butler, City of Mt. Pearl
- Ross Houlihan, Town of Torbay
- Jeff Lawlor, Town of Portugal Cove-St. Philips

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 (2015) and BTCRD, Director of Strategic Tourism Product Development (Dec 2015-present)
- Hospitality Newfoundland and Labrador, Craig Foley, CEO (Jan 2016 - present)

- NL Tourism Board, Lynn Taylor, NL Tourism Board Manager
- BTCRD, Scott Andrews, Manager Strategic Tourism Product Development, Linette Moores, Marketing Partnerships and Industry Liaison
- BTCRD, Gillian Skinner, Director, Regional Economic Development
- ACOA, Yvonne Hardy, Account Manager Community Economic Development
- Legendary Coasts of Eastern Newfoundland, Kathi Stacey, Executive Director
- Adventure Central Newfoundland, Shannon Pinsent, Executive Director
- Go Western, 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 Industry Advisory Committee (Table 51) 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.

Table 51: TDVAA North East Avalon & St. John's Regional Committee Members

Name	Company	Category	Sub-Region
Marlene Slaney	Sheraton	Roofed Accommodations	St. John's-Mount Pearl-Paradise
Kimberley Orren	Fishing for Success	Culture - Heritage	Goulds-Petty Harbour-Witless Bay-Bay Bulls
Rob Tizzard	The Mermaids Foley	F&B	Torbay-Logy Bay-Middle Cove-Outer Cove-Pouch Cove-Flatrock
Nancy Brace	Restaurant Association of Newfoundland (RANL)	Food and Beverage	All Regions
Teresita McCarthy	No 2 Mine Tour and Museum	Culture - Heritage	Portugal Cove-St. Philips-Bell Island
Julie Curran	Maxxim Vacations	Tour Operator	All Regions
Dion Finlay	Leaside Group of Companies	Accommodator	St. John's
Randy Murphy	East Coast Trail Association (ECTA)	Trials and Routes	All Regions
Mike Mooney	Manuels River Interpretation Centre	Culture - Heritage	CBS (Topsail, Manuals, Chamberlains, Kelligrews, Foxtrap, Seal Cove)
Kelly Mansell	Rocket Bakery	Food and Beverage	St. John's-Mount Pearl-Paradise
Ted Lacey	Del Sol	Retail	St. John's-Mount Pearl-Paradise
Jennifer Lacey	Del Sol	Retail	St. John's-Mount Pearl-Paradise
Kate Jewer	O'Brien's Boat Tours	Activity-Based	Goulds-Petty Harbour-Witless Bay-Bay Bulls

Sébastien Després	Mayor of Witless Bay		Goulds-Petty Harbour-Witless Bay-Bay Bulls
Krista Vincent	Tuckamore Festival	Festivals and Events	St. John's-Mount Pearl-Paradise
Vanessa McBay	The Rooms	Culture - Heritage	St. John's-Mount Pearl-Paradise
Jonathan Earle	The Outfitters	Retail	St. John's
Rona Moore	Heritage Shop of NL	Retail, Culture	St. John's
Ann Manuel	Craft Council of NL	Culture	St. John's
Seamus O'Keefe	George St. Association	F&B, Culture	St. John's
Evan Murray	Murrays Meadow Farm and Murray's Garden Centre	Culinary Attraction	Portugal Cove-St. Philips-Bell Island
Kim Cooper	NL Historic Trust	Heritage	St. John's
Scott Cluney	Downtown St. John's		
Keith Small	Ocean Quest	Activity-Based	CBS (Topsail, Manuals, Chamberlains, Kelligrews, Foxtrap, Seal Cove)
Kieran Henley	Newfoundland and Labrador Environmental Industry Association (NEIA)		All Regions

Data Collection Team

Data collectors were responsible for gathering the primary information related to specific information required for the appraisal process. Data collection team members were:

- Scott Andrews, BTCRD
- Jackie Harnum, BTCRD
- Trudy Winter, BTCRD
- Krista Noseworthy, VIC Counsellor
- Telelink staff

Appendix 2: Glossary of Terms

Source of most definitions: *Department of Business Tourism, Culture and Rural Development (BTCRD), and the Tourism Industry Association of Canada (TIAC).*

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

ADR: A standard accommodation performance metric calculated for the average daily rate for accommodations: calculated by revenue divided by rooms sold. ADR is used in the NL statistical reporting. (BTCRD).

Art gallery: A gallery for the display of artistic works as defined by BTCRD.

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 center 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. (BTCRD).

Attraction (local tourism): 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 BTCRD.

Attraction (major tourism): A business, facility or site whose primary purpose is attracting and satisfying the needs of travellers of which the majority resides outside of the general area.

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. (BTCRD).

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

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 cannot be used independently. (BTCRD).

Craft shop: A premise whose principal use is the sale or display of crafts produced in the Province. The craft shop is listed in the Tourism Destination Management System database of BTCRD.

Critical Acclaim: A tourism business has exceptionally high reviews and is looked upon enthusiastically and publicly by critics in the industry. This is demonstrated through international, national, or provincial awards, honors, multiple and consistently positive media reviews/blog coverage. It is not about local newspaper articles or awards related to ad spend, rather an earned public awareness of the entity.

Designated hiking/walking trails: A hiking/walking trail that is recognized by BTCRD as a travel generator that is maintained and monitored by a group or organization. (BTCRD).

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. (BTCRD).

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. (BTCRD).

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

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

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

Outfitter: Hunting and fishing businesses that package and supply visitors with a range of services from guides, to meals, and accommodations so that they may enjoy the outdoors.

Primary demand generator: Are iconic places, attractions, and activities that are 'main reason' domestic and international travellers decides to a destination (e.g. To visit Base Camp in Labrador, or Gros Morne National Park in the western region). They have distinct competitive positioning and visitor appeal, and by their nature attract travellers who then bring business to many other community and tourism businesses.

Non-resident tourist: A traveller 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. (BTCRD).

Resident tourist: A traveller 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. (BTCRD).

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. (BTCRD).

REVPAR: A standard accommodation performance metric calculated as: Room revenue divided by rooms available. (BTCRD).

Secondary demand generator: Are places, attractions, activities, and experience that a visitor chooses to enjoy once at the destination (e.g. attending a performance, enjoying a special local area tour). They are a complement the vacation but not the main reason for the visit.

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. (BTCRD).

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. 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 Assurance Plan (TAP): A set of common, minimum quality standards for tourism businesses that must be met in order for tourism services and attractions to participate in provincial and regional destination marketing and development initiatives.

Tourism Destination Management System (TDMS): A database of tourism products and services managed by BTCRD.

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 BTCRD Tourism Destination Management System.

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

International Documents

Brand USA (2014, August). *Annual report 2014.* Retrieved from http://dtxtq4w60xqpw.cloudfront.net/sites/all/files/pdf/unwto_annual_report_2014.pdf

IPK International. (2014, December). *ITB world travel trends report 2014/2015.* A report prepared for ITB Berlin and retrieved from: http://www.itb-berlin.de/media/itbk/itbk_dl_en/WTTR_Report_A4_4_Web.pdf

J. Blanke, & T. Chiesa (Eds.). (2013). *The travel & tourism competitiveness report 2013: Reducing barriers to economic growth and job creation.* J. Blanke, & T. Chiesa (Eds.). A document produced by the World Economic Forum, retrieved from http://www3.weforum.org/docs/WEF_TT_Competitiveness_Report_2013.pdf

United Nations World Tourism Organization. (2015). *Annual report 2014.* Retrieved from http://dtxtq4w60xqpw.cloudfront.net/sites/all/files/pdf/unwto_annual_report_2014.pdf

United Nations World Tourism Organization. (2014, November) *Global benchmarking for city tourism measurement.* Retrieved from https://s3-eu-west-1.amazonaws.com/staticunwto/Affiliate-members/Global_Benchmarking_HR.pdf

United Nations World Tourism Organization. (2014). *World Tourism Organization tourism highlights 2014 Edition*. Retrieved from: www.mkt.unwto.org

World Travel & Tourism Council. (2013, June). *Travel and tourism trends and economic impact.* Retrieved from: http://www.wttc.org/site_media/uploads/downloads/WTTC_monthly_update_June_2013.pdf

Visa & Tourism Industry Association of Canada. (2015). *Summer travel snapshot.* Retrieved from: http://tiac.travel/_Library/TIAC_Publications/Summer_Snapshot_2015_EN_-FINAL.pdf

National Documents

Note: In May 2015 the Canadian Tourism Commission rebranded to Destination Canada. All documents created prior to June 2015 remain as CTC citations, all as of June 2016 are cited as Destination Canada.

Atlantic Canada Opportunities Agency. (2011). *Tourism Atlantic's accelerated market readiness program (AMR).* Document provided by the NL Department of Tourism, Culture and Recreation.

Atlantic Canada Trail Association. (unknown). *Destination trail evaluation.* Document provided by the NL Department of Tourism, Culture and Recreation.

Business Research & Economic Advisors. (2013, Mar). *The economic contribution of the international cruise industry in Canada 2012.* Retrieved from: http://nwcruiseship.org/?LinkServID=64D88367-5056-9A58-CD196BA06138D200&showMeta=0

CBC News. (2015, June). *Parks Canada says tour operators need to pay up.* Retrieved from http://www.cbc.ca/news/canada/newfoundland-labrador/parks-canada-says-tour-operators-need-to-pay-up-1.3120000

CBC News. (2015, June). *Tour operators upset with Parks Canada fees.* Retrieved from http://www.cbc.ca/news/canada/newfoundland-labrador/tour-operators-upset-with-parks-canada-fees-1.3116665

Canadian Chamber of Commerce. (2013, July). *Restoring Canadian tourism: A discussion paper.* Retrieved from: http://www.chamber.ca/download.aspx?t=0&pid=834e382b-e8e3-e211-aaf9-000c29c04ade

Canadian Government, Department of International Trade. (2013). *Global markets action plan: The blueprint for creating jobs and opportunities for Canadians through trade.* Retrieved from: http://international.gc.ca/global-markets-marches-mondiaux/assets/pdfs/plan-eng.pdf

Canadian Tourism Commission. (2015, March). *Tourism Snapshot* (11)13. Retrieved from http://publications.gc.ca/collections/collection_2015/ic/Iu85-3-11-3-eng.pdf

Canadian Tourism Commission. (2014). *Global tourism watch – 2014 Canada summary report.* Retrieved from http://en.destinationcanada.com/sites/default/files/pdf/Research/Market-knowledge/Global-tourism-watch/UK/gtw_canada_2014_summary_report_eng.pdf

Canadian Tourism Commission. (2014). *Marketing Canada in an ever-changing world.* Document retrieved from https://en-corporate.canada.travel/sites/default/files/pdf/Corporate_reports/2015-2019_corporate_plan_summary_e_no_foreword.pdf

Canadian Tourism Commission. (2014, June). *Tourism as Canada's engine for growth: 2014-2018. Corporate plan summary.* Retrieved from: http://en-corporate.canada.travel/sites/default/files/pdf/Corporate_reports/cp_summary_2014-2018_-_june_9_e.pdf.

Canadian Tourism Commission. (2013, October). *Tourism snapshot: A focus on the markets in which the CTC and its partners are active. Vol. 9, Issue 10.* Retrieved from: https://en-corporate.canada.travel/sites/default/files/pdf/Research/Stats-figures/International-visitor-arrivals/Tourism-monthly-snapshot/tourismsnapshot_2013_10_eng.pdf

Canadian Tourism Commission. (2013, April). *World Economic Forum tourism competitiveness report 2013: An analysis and summary by the Office of Strategy Management and Research at the Canadian Tourism Commission.* Document provided by the Canadian Tourism Commission Office of Strategy Management and Research, retrieved from https://en-corporate.canada.travel/sites/default/files/pdf/Research/Industry-research/world_economic_forum_tourism_competitiveness_report_2013.pdf

Canadian Tourism Commission. (2012). *Explorer Quotient™ toolkit*. Retrieved from http://en-corporate.canada.travel/sites/default/files/pdf/Resources/EQ/v2/eq_toolkit.pdf

Canadian Tourism Commission. (2012). *Experiences toolkit (2nd Edition).* Retrieved from http://en-corporate.canada.travel/sites/default/files/pdf/Resources/sec_exptoolkit_lores_final.pdf

Canadian Tourism Human Resource Council. (2012). *Newfoundland & Labrador provincial labour market compendium.*

Canadian Tourism Human Resource Council. (2012, March). *Attracting and retaining tourism talent: Current labour issues and future challenges.* A powerpoint presentation for the HNL Board of Directors Meeting March 23, 2012.

Canadian Tourism Human Resource Council (unknown). *Summary compensation tables: Newfoundland & Labrador.* Extracts from the Canadian Compensation Study.

Clorey, C. (2013, September).*Tourism best practices: Arts and culture tourism products clustering final report.* Retrieved from: http://tourismbestpractices.com/uploads/document/Final%20Report_Arts%20and%20Culture.pdf

Conference Board of Canada. (2013, September). *Gateway to growth: Tourism competitive benchmarking study.* A report produced for the Canadian Tourism Commission and the Tourism Industry Association of Canada. Retrieved from: http://tiac.travel/_Library/TIAC_Publications/2013_Domestic_Tourism_Benchmarking_WEB_FINAL_EN.pdf

Deloitte LLP. (2015). *Tourism in Canada: Seizing economic growth.* Retrieved from: http://www.hotelassociation.ca/pdf/Tourism%20in%20Canada%20-%20Seizing%20Economic%20Growth.pdf

Deloitte. (2015). *The gender gap: The 2015 Deloitte millennial survey*. Document retrieved from https://www2.deloitte.com/content/dam/Deloitte/global/Documents/About-Deloitte/gx-wef-2015-gender-gap-millennial-survey.pdf

Deloitte. (2015). *Mind the gaps: The 2015 Deloitte millennial survey.* Document retrieved from http://www2.deloitte.com/global/en/pages/about-deloitte/articles/2015-millennial-survey-press-release.html

Deloitte LLP. (2014). *Hospitality 2015: Game changers or spectators?* Retrieved from: https://www.deloitte.com/assets/Dcom-Uruguay/Local%20Assets/Documents/Industrias/Uy_Hospitality_2015.pdf

Deloitte & Tourism Industry Association of Canada. (2013, November). *Passport to Growth: How international arrivals stimulate Canadian exports*. Retrieved from: http://media.deloitte.ca/flash/insights/ca_en_insights_tourism_and_trade_111313.pdf

Deloitte & Tourism Industry Association of Canada. (Winter 2013). *Navigate: New directions in tourism, hospitality and leisure.* (*Vol. 7).* Retrieved from: http://tiac.travel/_Library/TIAC_Publications/ca_en_Navigate2013_winter_112513.pdf

Deloitte LLP. (2013, September). *Consumer business economic update.* Retrieved from: *http://www.deloitte.com/assets/Dcom-Canada/Local%20Assets/Documents/CB/ca_en_cb_economic_update_Q32013_100313.pdf*

Deloitte LLP & Tourism Industry Association of Canada. (2012, Winter). *Navigate: New directions in tourism, hospitality and leisure.* Vol. 5. Retrieved from: http://tiac.travel/_Library/TIAC_Publications/Navigate_winter2012-13.pdf

Deloitte & Touche LLP. (2008). *Tourism amid turmoil: How Canadian companies can compete.* A research report prepared for TIAC. Retrieved from http://tiac.travel/_Library/documents/deloitte_tourism_amid_turmoil.pdf

Deloitte & Touche LLP. (2007). *Destination Canada, Are we doing enough?* A research report prepared for TIAC. Retrieved from http://www.deloitte.com/assets/Dcom-Canada/Local%20Assets/Documents/ca_en_cb_destinationcanada_june07(2).pdf

Fair, Chris (2014, November). *The Resonance Report: Canadian Quality Tourism Performance Report.* Retrieved from http://www.resonanceco.com/cdnreport.html

Federal Provincial Culture/Heritage & Tourism Initiative. (2013, September). *Proposed strategic plan - September 2010 to August 2013.* Document provided by the NL Department of Tourism, Culture and Recreation.

Gardner Pinfold. (2011, September). *Economic Value of wild Atlantic salmon.* Retrieved from http://0101.nccdn.net/1_5/13f/2a0/0fe/value-wild-salmon-final.pdf

Go2HR. (2014). *Baby Boomer Tool Kit: Employer's Tool Kit for Attracting, Recruiting and Retaining Baby Boomers.* Retrieved from https://www.go2hr.ca/sites/default/files/legacy/pdf/go2hr-Baby-Boomer-Tool-Kit.pdf

Government of Canada. (2012). *Federal tourism strategy annual report 2012.* Retrieved from: http://www.tourism.gc.ca/eic/site/034.nsf/vwapj/FTS_Annual_Report_2012-eng.pdf/$FILE/FTS_Annual_Report_2012-eng.pdf.

Grant Thornton (2013, June). *Visitor services program jurisdictional review: Destination BC.* A study produced for the Visitor Services branch of Destination BC. Retrieved from: http://www.qica.com.au/images/stories/qica-pdf/bcresearch.pdf

HLT Advisory Inc, Tourism Industry Association of Canada, & Visa Canada. (2012, Fall). *The Canadian tourism industry: A special report.* Retrieved from http://tiac.travel/_Library/documents/The_Canadian_Tourism_Industry_-_A_Special_Report_Web_Optimized_.pdf

Hotel Association of Canada. (2013, July). *Update on the Competition Bureau and destination marketing programs.* Retrieved from: www.naylornetwork.com/hoc-nwl/articles/index.asp?aid=225979&issueID=29432

Human Resources & Skills Development Canada. (2013, June). *EI program characteristics for the period of May 12, 2013 to June 08, 2013.* Retrieved from: www.srv129.services.gc.ca/eiregions/eng/rates_cur.aspx

Malatest & Associates, R. A. (2012). *2012 Canadian tourism sector compensation study.* Prepared for the Canadian Tourism Human Resource Council.

National Marine Manufacturers Association Canada. (2012). *The economic impact of recreational boating in Canada 2012.* Retrieved from http://www.nmma.ca/assets/cabinets/Cabinet485/NMMA%20Boating%20Economic%20Impact%20Study%202.pdf

National Roundtable on Travel and Tourism. (2012, Winter). *Gateway to growth: Modernizing Canada's visitor visa process.* Retrieved from: http://tiac.travel/_Library/documents/NRTT_Visa_Whitepaper_Final_Web.pdf

National Travel and Tourism Coalition. (2010, October). *Looking to 2020. The future of travel and tourism in Canada.* Retrieved from: http://tiac.travel/_Library/documents/NTTC_Whitepaper_Final.pdf

Parks Canada. (2013). *Cape Spear NHS Market analysis 2013.*

Parks Canada. (2013). *Castle Hill Market analysis 2013.*

Parks Canada. (2013). *Signal Hill market analysis 2013.*

Parks Canada. (2013, August). *Middle age achievers (families)*. Document provided Parks Canada from their Social Sciences PRIZM reference library.

Parks Canada. (2013, August). *Singles scene (young adults).* Document provided Parks Canada from their Social Sciences PRIZM reference library.

Parks Canada. (2012). *Market and visitor analytics.*

Parks Canada, Heritage Lighthouse Program. (2012). *Lighthouses in Newfoundland & Labrador petitioned to be considered for heritage designation under the Heritage Lighthouse Protection Act.* Document provided by the Western Destination Marketing Organization.

Tourism Industry of Canada & Visa. (2015, Winter). *Winter travel snapshot*. Retrieved from http://tiac.travel/_Library/TIAC_Publications/Visa_Canada_Travel_Snapshot_Winter2015.pdf

Tourism Industry Association of Canada. (2014). *Gateway to Growth: Visitor VISA Progress Report*. Retrieved from http://tiac.travel/_Library/TIAC_Publications/2013_Progress_Report_Visitor_Visa_WEB.pdf

Tourism Industry Association of Canada. (2014). *Gateway to Growth: Travel & Tourism Labour Force Report.* Retrieved from http://tiac.travel/cgi/page.cgi/_zine.html/Home_Header/2014_Gateway_to_Growth_-_Travel_Tourism_Labour_Force_Report

Tourism Industry Association of Canada. (2014). *2014 Gateway to growth: Creating investment opportunities in the Canadian hotel industry.* Retrieved from: http://tiac.travel/_Library/TIAC_Publications/TIAC_Investment_Review_Final.pdf.

Tourism Industry Association of Canada. (2014). *TIAC-VISA 2014 Summer Travel Snapshot.* Retrieved from: http://tiac.travel/_Library/TIAC_Publications/Visa_Canada_Travel_Snapshot_FINAL_PDF.pdf

Tourism Industry Association of Canada. (2013). *Gateway to growth: Connecting America.* Retrieved from: http://tiac.travel/_Library/TIAC_Publications/TIAC_Connecting_America_EN.pdf

Tourism Industry Association of Canada. (2013). *Gateway to growth. Aiming high: Air access to Canada.* Retrieved from: http://tiac.travel/_Library/TIAC_Publications/2013_Aviation_Paper_WEB.pdf

Tourism Industry Association of Canada. (2013, September). *Gateway to growth driving global opportunity.* A report produced for the Canadian Tourism Commission and the Tourism Industry Association of Canada. Retrieved from: http://tiac.travel/_Library/TIAC_Publications/Gateway_to_Growth_-_Sept_2013_FPT_Meeting_-_Sept_6_EN_-_WEB.pdf

Tourism Industry Association of Canada. (2011, Summer). *Gateway to growth: Our global competitiveness requires a new roadmap (M.A.P).* Retrieved from http://tiac.travel/_Library/documents/gateway_to_growth_june_2011.pdf

PROVINCIAL

Association of Heritage Industries Newfoundland & Labrador. (2012, November). *Report on deliberations. Reach strategies roundtable on sustainability*. Document provided by the NL Department of Tourism, Culture and Recreation.

Bristol Omnifacts Research. (2010, March). *Tourism training needs & industry engagement assessment final report.* Document provided by the NL Department of Tourism, Culture and Recreation.

CBC Radio-Canada. (2015). *Airbnb a risky business that impacts tourism industry: HNL*. Document retrieved from http://www.cbc.ca/news/canada/newfoundland-labrador/airbnb-a-risky-business-that-impacts-tourism-industry-hnl-1.3060373

Cruise Newfoundland and Labrador Canada. (2015). *St. John's statistics 2015.* A document provided by the Department of Business, Culture, Tourism and Recreation.

Cruise Newfoundland and Labrador Canada. (2015). *2015 schedule by port.* Retrieved from http://www.cruisetheedge.com/cruise-schedule/schedule-by-port/

Cruise Newfoundland and Labrador. (2014, December). *Newfoundland and Labrador 2015 cruise schedule*. Retrieved from: http://www.cruisetheedge.com/

Cruise Newfoundland and Labrador. (2014, December). *Newfoundland and Labrador 2015 cruise packages*. Retrieved from: http://www.cruisetheedge.com/

Cruise Newfoundland and Labrador. (2014, November 6). *Newfoundland and Labrador cruise schedule.* Document provided by Cruise NL.

Cruise Newfoundland & Labrador. (2014, April 02 revision). *Newfoundland and Labrador cruise schedule.* Retrieved from http://www.cruisetheedge.com/cruise-schedule/2014-schedule-by-port/

Cruise Newfoundland & Labrador. (2013, November). *Cruise ship schedule 2014.* Retrieved from: http://cruisetheedge.com/cruise-itineraries.asp and http://cruisetheedge.com/schedule.asp

Cruise Newfoundland & Labrador. (2012, December. *Cruise ship schedule 2012* Retrieved from: http://cruisetheedge.com/cruise-itineraries.asp and http://cruisetheedge.com/schedule.asp

Cruise Newfoundland and Labrador. (2012). *Cruise ship statistics for St. John's Newfoundland 2011 and 2012.* Document provided by Cruise NL.

Economic Planning Group & DW Knight Associates. (2010, January). *A special place. A special people: A Newfoundland and Labrador tourism product development strategy.* Document provided by the NL Department of Tourism, Culture and Recreation.

Economic Planning Group & DW Knight Associates. (2004). *A special place. A special people. The future of Newfoundland and Labrador tourism.* A report prepared for the Department of Tourism, Culture and Recreation. Downloaded: http://www.fin.gov.nl.ca/fin/faq/hnl_report.pdf

Globe Advisors. (2011, September). *An analysis of the economic development opportunities associated with the green economy in Newfoundland & Labrador*. Vancouver, BC. Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador. (2015, Oct). *Department of Business, Tourism, Culture and Rural Development (BTCRD) year-to-date (ytd) tourism highlights September 2015.* Retrieved from: http://www.btcrd.gov.nl.ca/tourism/tourism_marketing/pdf/Tourism_performance_2015_YTD_September_2015_November%203_2015.pdf

Government of Newfoundland and Labrador. (2015). *Department of Business, Tourism, Culture and Rural Development, Year-end Provincial Tourism Performance*

Government of Newfoundland and Labrador. (2015, July). *Department of Business, Tourism, Culture and Rural Development, departmental funding approvals Q1 (Apriil 1, 2015 - June 30, 2015).*

Government of Newfoundland Labrador (2015, Jul). *North Avalon region performance Indicators*. A document provided by the NL Department of Business, Tourism, Culture and Rural Development.

Government of Newfoundland Labrador (2015, Mar.) *Year-end provincial tourism performance 2014, March.* Document provided by the NL Department of Business, Tourism, Culture and Rural Development.

Government of Newfoundland & Labrador. (2015). *Creating experiences: A toolkit for the tourism industry.* Downloaded: http://www.tcr.gov.nl.ca/tcr/tourism/tourism_development/pdf/NLT2294_NL_toolkit.pdf

Government of Newfoundland & Labrador. (2014). *2014 - 2017 Strategic Plan: Department of Business, Tourism, Culture and Rural Development.* Retrieved from: http://www.btcrd.gov.nl.ca/publications/pdf/strategic_plan_2014_17.pdf

Government of Newfoundland & Labrador Tourism Research Department. (2014). *NL Occupancy rates_by_region_2014.* A document provided by the department of Business, Tourism, Culture and Rural Development.

Government of Newfoundland & Labrador. (2014). *Canadian travel market summary March 2014.* Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador Advanced Education and Skills. (2014). *Targeted initiative for older workers. Guide for proposals 2012 - 2013.* A government funding program to support NL's unemployed older workers

Government of Newfoundland & Labrador. (2014, Oct.). *2013, 2007, 2006, 2003 Synthesized occupancy statistics by star level.* A western region accommodation special data run from the TDMS provided by the Department of Business, Tourism, Culture and Rural Development.

Government of Newfoundland & Labrador. (2014, March). *Opportunity management overview.* Powerpoint presentation provided by the NL Department of Innovation, Business and Rural Development.

Government of Newfoundland & Labrador. (2014, February). *The Canadian vacation travel market summary.* Conference presentation at the Hospitality Newfoundland and Labrador Conference and Trade Show in Gander NL.

Government of Newfoundland & Labrador. (2013). *Airport passenger movements by airport: 1993 to 2012.* An excel workbook provided by the Department of Tourism, Culture and Recreation with data by airport.

Government of Newfoundland and Labrador – Department of Tourism, Culture and Recreation. (2013). B*ackgrounder year-end provincial tourism performance 2013.* Retrieved by: http://www.tcr.gov.nl.ca/tcr/publications/2012/Tourism_Performance_2012_Province_Final_March_2013.pdf.

Government of Newfoundland & Labrador. (2013). *Provincial visitor information centre employee list: 2011-2013.* Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador. (2013). *Regional visitor information funding statistics.* Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador. (2013). *Tourism data management system.* Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland and Labrador. (2013, November). *Tourism research: Roofed accommodation occupancy trends 2008 - 2012.* An excel workbook provided by the Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador. (2013). *Trail development information for project sponsors.* Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland and Labrador. (2013, November). *Tourism Research: Roofed accommodation occupancy trends 2008 - 2012.* An excel workbook provided by the Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador. (2013, Fall). *Provincial air access tracking program.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2013/Seat_Capacity_to_NL_Q3_2013.pdf

Government of Newfoundland and Labrador Tourism Research Division. (2013, April). *Provincial visitor exit survey results summary.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Provincial_Visitor_Exit_Survey_Summary_Updated_April_%202013.pdf

Government of Newfoundland & Labrador Advanced Education and Skills. (2012). *Targeted initiative for older workers. Guide for proposals 2012 - 2013.* A government funding program to support NL's unemployed older workers

Government of Newfoundland & Labrador. (2012, 2011, 2010, 2009, 20008, 2007, 2006, 2005, 2004, 2003). *Tourism performance.* Annual performance reports produced by the Department of Tourism Culture and Recreation. Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/index.html#Reports

Government of Newfoundland & Labrador. (2012). *Detailed visitor figures for the visitor information centres.* A document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador. (2012). *Regional visitor spending comparison 2008 - 2011.* An excel table provided by the Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador, Department of Environment and Conservation. (2012). *Statistical report on the parks and natural areas division NL*. Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador. (2012. April). *Newfoundland and Labrador labour market: Outlook 2020.* A powerpoint presentation by the Department of Advanced Education and Skills.

Government of Newfoundland & Labrador. (2012, January). *Resident travel survey summary report - Final - 2010.* A study conducted by MarketQuest Omnifacts Research for the Department of Tourism, Culture and Recreation.

Government of Newfoundland & Labrador. (2011). *Coastal and ocean management strategy and policy framework.* Document produced by Fisheries and Aquaculture.

Government of Newfoundland & Labrador. (2011). *2011 Exit survey. Program highlights (non-resident).* Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland and Labrador Tourism Research Division. (2011). *2011 Exit survey profile of non-residents visiting an archaeological site.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Visitor_Exit_Survey_Highlights_Document_Final_TCR_Revised.pdf

Government of Newfoundland and Labrador. (2011). *2011 Exit survey: Profile of non-residents visiting for business/convention.* Document provided by the Government of Newfoundland and Labrador Department of Tourism, Culture and Recreation, retrieved from http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit%20Survey_Business_Convention_Visitors.pdf

Government of Newfoundland and Labrador Tourism Research Division. (2011). *2011 Exit survey profile of non-residents visiting. The province's craft/gift shops.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit_Survey_Craft_and_Gift_Shopping.pdf

Government of Newfoundland and Labrador. (2011). 2011 *Exit survey. Profile of non-residents visiting for vacation/pleasure.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Visitor_Exit_Survey_Vacation_Pleasure_Market.pdf

Government of Newfoundland and Labrador – Department of Tourism, Culture and Recreation. (2011). *2011 Exit survey – Profile of non-residents using a visitor information centre (VIC).* Retrieved from : http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit_Survey_VIC_Users.pdf.

Government of Newfoundland and Labrador – Department of Tourism, Culture and Recreation. (2011). *2011 Exit survey – Profile of non-residents visiting from the Maritimes.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Visitor_Exit_Survey_Profile_of_Visitors_from_the_Maritimes.pdf.

Government of Newfoundland and Labrador. (2011). *2011 Exit survey. Profile of non-residents visiting from Quebec.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Visitor_Exit_Survey_Profile_of_Visitors_from_Quebec.pdf

Government of Newfoundland and Labrador - Department of Tourism, Culture and Recreation. (2011). *Exit survey – Profile of non-residents visiting from Ontario.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Visitor_Exit_Survey_Profile_of_Visitors_from_Ontario.pdf.

Government of Newfoundland and Labrador – Department of Tourism, Culture, and Recreation. (2011). *2011 Exit survey. Profile of non-residents visiting Newfoundland and Labrador alone.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit_Survey_Profile_of_Non_Resident_Visitors_Travelling_Alone.pdf

Government of Newfoundland and Labrador Tourism Research Division. (2011). *2011 Exit survey profile of non-residents. Participating in geological tours/fossil observation.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Visitor_Exit_Survey_Geological_Tours_Fossil_Observation.pdf

Government of Newfoundland and Labrador Tourism Research Division. (2011). *2011 Exit survey profile of non-residents visiting the province's historic sites.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit_Survey_Historic_Sites_Visitors.pdf

Government of Newfoundland and Labrador Tourism Research Division. (2011). *2011 Exit survey profile of non-residents participating in pleasure walking in/around communities.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Visitor_Exit_Survey_Pleasure_walking_in_around_Communities.pdf

Government of Newfoundland and Labrador Tourism Research Division. (2011). *2011 Exit survey profile of non-resident trail hikers*. Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Visitor_Exit_Survey_Trail_Hikers.pdf

Government of Newfoundland and Labrador Tourism Research Division. (2011). *2011 Exit survey profile of non-residents travelling alone.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit_Survey_Profile_of_Non_Resident_Visitors_Travelling_Alone.pdf

Government of Newfoundland and Labrador Tourism Research Division. (2011). *2011 Exit survey profile of non-residents visiting from the United States.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/Visitor%20Exit%20Survey/2011_Visitor_Exit_Survey_Profile_of_Visitors_from_the_United_States.pdf

Government of Newfoundland & Labrador. (2011). *2011 Exit survey — whales, birds & icebergs (non-resident) NL.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit_Survey_Whales_Birds_and_Icebergs.pdf

Government of Newfoundland and Labrador Tourism Research Division. (2011). *2011 Exit survey profile of non-residents visiting the Avalon region (economic zones 17-20, excluding St. John's) / St. John's.* Document retrieved from: http://www.btcrd.gov.nl.ca/publications/recreation/2011/2011_Visitor_Exit_Survey_Visitors_to_Avalon.pdf

Government of Newfoundland and Labrador Tourism Research Division. (2011). *2011 Exit survey – profile of international visitors.* Retrieved from http://www.btcrd.gov.nl.ca/publications/recreation/visitor_exit_survey/2011_ves_International_Visitors.pdf

Government of Newfoundland and Labrador. (2011). *2011 exit survey – profile of non-residents visiting friends and relatives.* Document provided by the Government of Newfoundland and Labrador Department of Tourism, Culture and Recreation, retrieved from http://www.tcr.gov.nl.ca/tcr/publications/2011/2011_Visitor_Exit_Survey_VFR_Visitors.pdf

Government of Newfoundland and Labrador Tourism Research Division. (2011). *2011 Exit survey – repeat versus first time visitors.* Retrieved from http://www.btcrd.gov.nl.ca/publications/recreation/visitor_exit_survey/2011_Visitor_Exit_Survey_Repeat_versus_First_Time_Visitors.pdf

Government of Newfoundland & Labrador. (2011). *Newfoundland and Labrador labour market outlook 2020.* A report prepared by the Department of Human Resources, Labour and Employment. http://www.aes.gov.nl.ca/publications/LMOutlook2020.pdf

Government of Newfoundland & Labrador. (2011). *Recommendation for the tourist oriented directional signage program (TODS) for Newfoundland and Labrador.* Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland and Labrador. (2010, Jan). *A special place a special people: A Newfoundland and Labrador tourism product development strategy.* Source Unknown.

Government of Newfoundland & Labrador. (2016,March). *Uncommon Potential: A Vision for Newfoundland and Labrador Tourism (Vision 2020).* Retrieved from h http://hnl.ca/resources/vision-2020/

Government of Newfoundland and Labrador. (2007). *Active, healthy Newfoundland and Labrador. A recreation sport strategy for Newfoundland and Labrador.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2007/active_healthyNL.pdf

Government of Newfoundland & Labrador. (2007). *TDMS data definitions.* Document provided by the NL Department of Tourism, Culture and Recreation.

Government of Newfoundland and Labrador. (2006). *Creative Newfoundland and Labrador: The blueprint for development and investment in culture.* Retrieved from: http://www.tcr.gov.nl.ca/tcr/publications/2006/culturalplan2006.pdf

Government of Newfoundland & Labrador. (no date). *Brand positioning statement.* Retrieved from www.tcr.gov.nl.ca/tcr/tourism/tourism_marketing/newfoundland_and_labrador_brand

Government of Newfoundland and Labrador. (no date). *The crisis: Recommendations for a sustainable heritage secto*r. A draft report provided by the NL Department of Tourism, Culture and Recreation.

Harris Decima. 2014). *Newfoundland and Labrador – non-resident travel motivations study 2014 – profile of Canadian travellers.* Retrieved from: http://www.btcrd.gov.nl.ca/tourism/tourism_research/pdf/NL_NR_CDN_TAMS.pdf

Harris Decima. (2014). *Newfoundland and Labrador – non-resident travel motivations study 2014 – profile of US travellers.* Retrieved from http://www.btcrd.gov.nl.ca/tourism/tourism_research/pdf/NL_NR_US_TAMS.pdf

Haynes, R. (2008). *Where do the Newfoundland and Labrador travel/tourism numbers come from?* Retrieved from:

Higgins, K. (2014, June). *Stay a while. The Southern Gazette.* Retrieved from http://www.southerngazette.ca/News/Local/2014-06-18/article-3767515/Stay-awhile/1

Hospitality Newfoundland and Labrador. (2015 Apr 30). *Press Release.* Retrieved from a stakeholder email.

Hospitality Newfoundland and Labrador. (2015, Apr). *Star grading statistics for accommodations.* An internal document provided by email to support the project analysis.

Hospitality Newfoundland & Labrador. (2014). *Tourism Assurance Plan.* An information document.

Hospitality Newfoundland & Labrador. (2013, April). *Tourism Assurance Plan.* A powerpoint presentation provided by HNL.

Hospitality Newfoundland & Labrador. (2013). *Business Retention & Expansion (BR&E): Accelerated Market Readiness (AMR) Program.* A document provided by HNL.

Keel-Ryan, J. (2014, Nov.). *Tourism Experiences: A world of opportunities.* A key-note address at the Northern Ontario Tourism Summit

Morrisey, J. (2007 May). *Avalon traffic counts, district 1, 2007.* Document provided by the Western Destination Marketing Organization.

Newfoundland Arts Council. (2009, January). *An analysis of opportunities to increase private sector funding to Newfoundland and Labrador's arts and heritage sector NL*. Document provided by the NL Department of Tourism, Culture and Recreation.

Parsons, P. & Fennelly, J. (2010, May). *An analysis of major festivals in Newfoundland and Labrador in 2009 final report*. Document provided by the NL Department of Tourism, Culture and Recreation.

RDEE Terre-Neuve-et-Labrador (2013). *Strategic plan 2013-2016.* Retrieved from : http://www.rdeetnl.ca/sites/prod.rdeetnl.site.koumbit.net/files/strategic_plan_2013-2016_rdee_tnl_0.pdf

Tourism Quality Assurance of Newfoundland and Labrador. (2015, Mar). *Program expansion proposal 2015 - 2015.* A document provided by HNL.

NORTH EASTERN AVALON & ST. JOHN'S REGION COMMUNITY LEVEL DOCUMENTS

CBCL Limited. (2013, July). *Conception Bay South Main Street – improvement plan.* Retrieved from http://www.conceptionbaysouth.ca/wp-content/uploads/2012/01/CBS-Main-Street-Plan-Final-Low-Res.pdf

CBCL Limited (2012, July). *Town of Conception Bay South – municipal plan 2011-2012.* Retrieved from http://www.conceptionbaysouth.ca/wp-content/uploads/2012/04/093114-CBS-Plan-FIN-Apr-17.pdf

City of St. John's (2014, July). *Envision St. John's municipal plan – draft.* Retrieved from http://www.stjohns.ca/sites/default/files/files/publication/Envision%20St.%20John%27s%20Draft%20Municipal%20Plan.pdf

City of St. John's. (2014, May). *Approved funding amounts.* Not found online.

City of St. John's. (2011, December). *Roadmap 2021 – a strategic economic plan for St. John's.* Retrieved from http://www.stjohns.ca/sites/default/files/files/publication/Roadmap2021.pdf

City of St. John's. (2010, June.). *Planning for a Creative Future – the city of St. John's municipal arts plan.* Retrieved from http://www.stjohns.ca/sites/default/files/files/publication/MunicipalArtsPlan_0.pdf

Collins, E. (2014, April). *A winter 2014 assessment: the city of St. John's trolley line service as a pilot project and how to encourage future development.* Document not online.

Destination St. John's. (2014). *2014 annual report.* A document provided by Destination St. John's.

Economic Research and Analysis Division, Department of Finance, Government of Newfoundland and Labrador. (2014, June). *Population projections for the St. John's census metropolitan area.* Retrieved from http://www.stjohns.ca/sites/default/files/files/publication/SJCMA%20Population%20Projections.pdf

Economic Research and Analysis Division, Department of Finance, Government of Newfoundland and Labrador. (2013). *The economic benefit of the East Coast Trail to the Newfoundland and Labrador economy in 2013.* Retrieved from http://www.eastcoasttrail.ca/pdf/EconomicImpactAssessmentHighlights.pdf

Elton Management Consulting. (2012, March). *Final report – sport tourism strategy, destination St. John's.* Retrieved from https://www.google.ca/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&ved=0CB4QFjAAahUKEwjNuo654e7GAhWINj4KHf8KAA4&url=http%3A%2F%2Fwww.partnershipgroup.ca%2Fdownload%2Fwhitepapers%2FElton_SportTourismReport_ES_2012_FINAL.pdf&ei=e4-vVY2RNIjt-AH_lYBw&usg=AFQjCNEEt6zOyxtR87LFQGa8zBMYBvCcaQ&sig2=_zbJWOdO8MGw7DzxFOAbxg&bvm=bv.98197061,d.cWw&cad=rja

Enterprise Conception Bay South. (2014). *Bright future investment profile 2014. Retrieved from http://www.enterprisecbs.ca/wp-content/uploads/2013/05/Investment-Profile-Web.pdf*

Enterprise Conception Bay South. (n.d.) *Conception Bay South – opportunities.* Document provided an advisory committee member.

Independent Consultants Group. (2015, February). *Witless Bay – tourism and business renewal and growth strategy: 2015 – 2020.* Retrieved from http://www.townofwitlessbay.com/Tourism%20&%20Business%20Renewal%20Growth%20Strategy%20Plan%202015-2020.pdf

Miller Dickinson Blais. (2013, December). *Torbay economic development strategy plan – final report.* Retrieved from http://torbay.ca/images/FormsPermits/Economic/Torbay%20EcDev%20Strategic%20Plan%20-%202013-12-03.pdf

Office of Strategy & Engagement City of St. John's. *St. John's – a demographic snapshot: a glimpse into the future.* Retrieved from http://www.stjohns.ca/sites/default/files/files/publication/11X17%20Demographic%20Fact%20Sheet.pdf

PKF Consulting. (2009). *Business case study and analysis for the recommended expansion of the St. John's convention centre: Final report.* Retrieved from: http://www.stjohns.ca/sites/default/files/files/publication/ST.%20JOHN'S%20CONVENTION%20CENTRE%20REPORT.pdf

Sierra Planning and Management. (2011, June). *City of Mount Pearl – economic development, tourism and marketing strategy 2011-2016 – final strategy.* Not found online.

Sierra Planning and Management. (2011). *City of Mount Pearl – economic development, tourism & marketing strategy: background report.* Not found online.

STEP. (2014). *STEP St. John's 2014 annual report.* A document retrieved from: http://www.sokassociates.com/wp-content/uploads/STEP-St.-Johns-2014-Annual-Report.pdf

Town of Paradise. (2013). *Town of Paradise Department of Recreation and Leisure Services.* A document provided by Destination St. Johns.

Trace Planning and Design. (2014, December). *St. John's Parks & Open Space Master Plan.* Retrieved from http://www.stjohns.ca/sites/default/files/files/publication/Open%20Space%20Master%20Plan.pdf

TRACT Consulting. (2015, May). *Portugal Cove – St. Philip's community work plan (part 1).* Not found online.

TRACT Consulting. (2015, May). *Portugal Cove – St. Philip's community work plan (part 2).* Not found online.

TRACT Consulting. (2015, May). *Portugal Cove – St. Philip's work plan appendices.* Not found online.

TRACT Consulting Inc. (2012, September). *Conception Bay South – T'Railway Development Plan – Final report.* Retrieved from http://www.conceptionbaysouth.ca/wp-content/uploads/2012/10/CBS-TRailway-Final-Report.pdf

TRACT Consulting Inc. (2010, April). *Torbay comprehensive tourism plan*. Retrieved from http://www.town.torbay.nf.ca/userfiles/file/Final%20Report%20April%202010%20Compiled(1).pdf

TRACT Consulting Inc. (2009, August). *Town of Torbay recreation master plan – final report.* Retrieved from http://www.torbay.ca/images/FormsPermits/Community/RecreationMasterPlan2009.pdf

TRACT Consulting & PERC Ltd. (2009, February). *City of St. John's recreation and parks master plan 2008-2018.* Retrieved from http://www.stjohns.ca/sites/default/files/files/publication/RecreationandParksMasterPlan2008.pdf

Appendix 4: Vision 2020 Alignment Summary

In March 2016, the Newfoundland and Labrador Tourism Board refreshed *Vision 2020* updating the goals and objectives to reflect the accomplishments since the original release date in 2009, as well as the continued challenges heading into 2020. The refreshed version of *Vision 2020* can be viewed at, http://hnl.ca/resources/vision-2020/ .

Within *Vision 2020*, there are seven areas of investment with 15 goal categories. (Table 52). The alignment of each of the 15 major findings from this study is identified in Table 53.

Table 52: Vision 2020 Goals and Primary Objectives

Goal	1. Private Public Leadership - A Partnership for Tourism Growth & Development
1.1	Continue the alignment of Tourism Board partners and tourism industry stakeholders to strengthen communications and engagement.
1.2	Be a visible leader of responsible, sustainable tourism development.
	2. Sustainable Transport Network - A Transportation Strategy to Grow Our Industry
2.1	Build strong relationships with key transportation alliances and create partnerships to facilitate meeting the demands for affordable, accessible, and quality transportation to, from and within the province.
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 collaborative tourism research strategy and targeted research investments that provide industry and government with relevant and timely information.
3.2	Regularly communicate tourism research and ensure timely and relevant interpretation for tourism stakeholders.
	4. Product Development - Delivering Strategic & Sustainable Travel Experiences
4.1	Develop and implement a provincial experience strategy that resonates with travellers, reinforces our unique brand and increases the return-on-investment for tourism stakeholders and the return-on-emotion for visitors.
4.2	Continue to improve the infrastructure, activities and programs that will increase the appeal of the destination.
4.3	Continue to focus on and promote the importance of being market-ready and delivering high quality products, services and experiences to meet traveller expectations.
	5. Tourism Technology - Strengthening Our Information & Communications Technology
5.1	Continue to work with tourism partners and operators to integrate technology as a critical element of attracting visitors and enhancing experiences and services.
	6. Marketing Our Brand – Leveraging 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	Expand marketing partnerships efforts with tourism stakeholders to ensure there is a clear understanding of how all stakeholders can work together in promoting the province as a destination.
	7.Empowering Our People - Growing Our People for a Dynamic Industry
7.1	Support the tourism industry in creating opportunities for entrepreneurs, employees, volunteers and citizens to participate in deepening the visitors' appreciation and understanding of our unique culture and traditions.

Goal	1. Private Public Leadership - A Partnership for Tourism Growth & Development
7.2	Enable tourism operators access to learning supports that will develop a training culture within the industry that aligns with delivering on promises and raising the bar for quality and service.

Table 53: North East Avalaon Region's Vision 2020 TDVAA North East Avalon Recommendations Alignment

Finding	*Leadership*	*Transport*	*Research*	*Product/ Experience*	*Technology*	*Marketing*	*HR*	*Core*
1	1.1, 1.2			4.1				
2	1.1			4.2, 4.3				
3	1.1	2.2	3.1	4.3		6.2	7.1	
4				4.2, 4.3		6.3		
5	1.2	2.1		4.1, 4.3		6.3		
6				4.1, 4.3	5.1			
7	1.1			4.3		6.1		
8	1.2		3.1	4.2, 4.3		6.3	7.2	
9		2.1, 2.2		4.3		6.3		
10				4.3		6.2	7.2	
11				4.1				
12							7.1	
13					5.1	6.2, 6.3	7.2	
14			3.1			6.3		
15								X