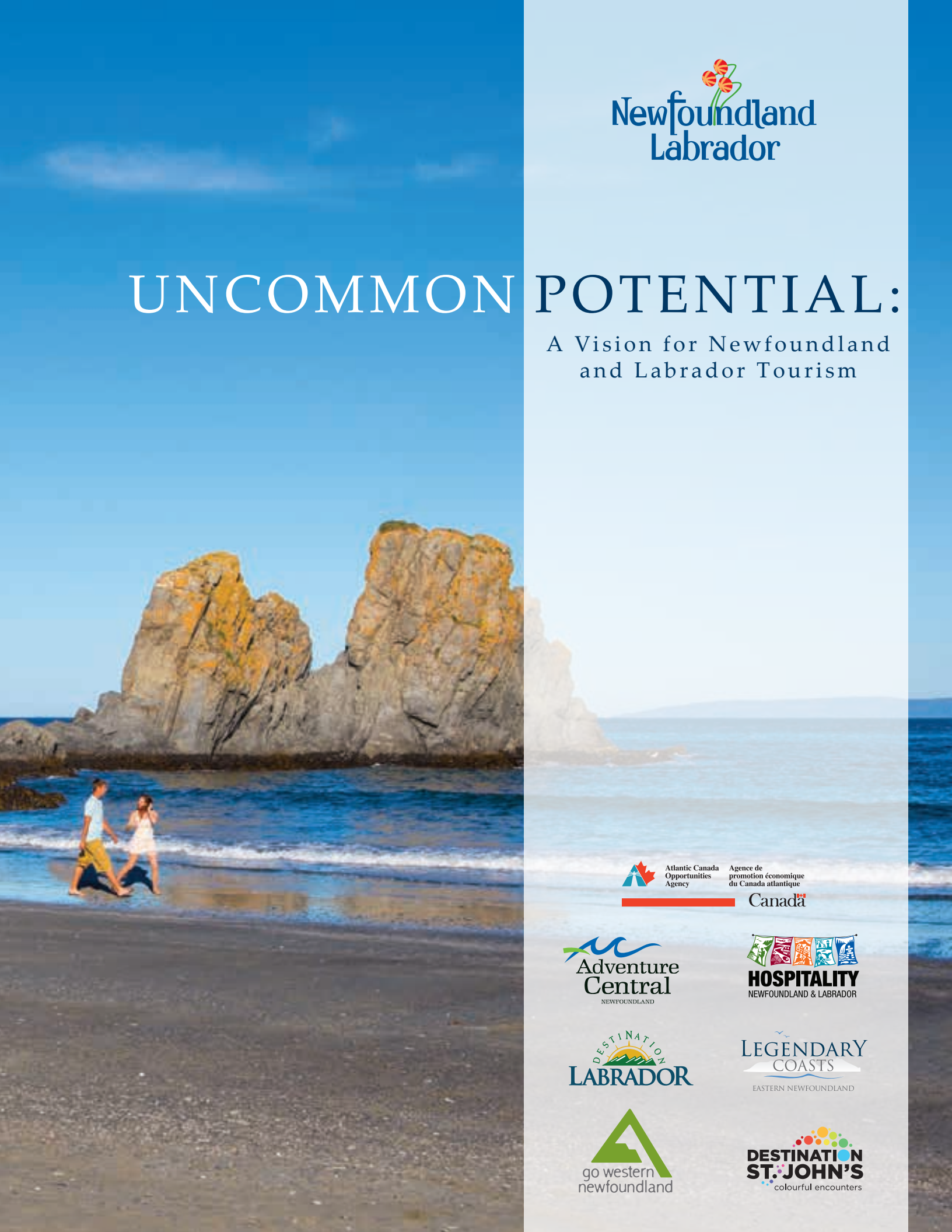




UNCOMMON POTENTIAL:

A Vision for Newfoundland and Labrador Tourism







*“It is not in the
stars to hold
our destiny but
in ourselves.”*

—William Shakespeare

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INTRODUCTION



Our Continued Vision for the Future

When the Vision was launched in 2009, the tourism industry was contributing \$790 million (2007) to the economy of Newfoundland and Labrador, supporting almost 13,000 direct jobs in tourism and generating significant economic and cultural spinoff. In 2015, the halfway point to the Vision's target of doubling tourism spending by 2020, there has been no shortage of accomplishments. Most notably, tourism has grown to contribute approximately \$1.1 billion (2013) to the provincial economy and is responsible for over 18,000 direct jobs. This growth is driven in large part to the commitment by all partners to focus on collective priorities, as well as strategic and focused investment in the industry.

As an industry that generates far beyond simply economic benefits, tourism continues to help preserve and protect our natural environment, culture, and heritage. The tourism industry has proven itself capable of maintaining its position as an economic driver. All tourism businesses in the province play a role in the tourism industry whether they are private, public or not-for-profit. With the changing economy and the changing demands of the traveller, it is important that each business consider what it will take to remain sustainable in the long-term. Determining the appropriate business models and what is sustainable in the long-term will ensure there is a tourism industry to enjoy for years to come.

As partners of the Newfoundland and Labrador Tourism Board continue to work towards the achievement of the *Vision*, it is timely to renew our collective commitment by refreshing our goals and objectives. The implementation of *Vision 2020* thus far has driven us towards a common goal together. Now, more than ever, we are poised to meet the challenges head on and achieve our ultimate goal: doubling tourism spending by 2020 by attracting more visitors, getting them to stay longer and providing opportunities for them to experience more.

Implementing *Vision 2020*

Vision 2020 provides an overview of the guiding principles and broad action plan of the tourism *Vision* to develop Newfoundland and Labrador as an exotic and leading travel destination.

Developed and launched in 2009, one of the first directives of *Vision 2020* was the establishment of the Newfoundland and Labrador Tourism Board as a private-public partnership with the mandate of guiding the implementation of the Seven Strategic Directions outlined within the Vision.

Partners on the Newfoundland and Labrador Tourism Board are:

- Industry Chair (appointed by the Minister of Business, Tourism, Culture and Rural Development)
- Chair of Hospitality Newfoundland and Labrador and three Hospitality Newfoundland and Labrador industry representatives
- Chairs of Destination Management Organizations (DMO) from each of the five regions
- Deputy Minister of Business, Tourism, Culture and Rural Development (BTCRD)
- Assistant Deputy Minister of Tourism and Culture, Department of Business, Tourism, Culture and Rural Development (BTCRD)
- Assistant Deputy Minister of Regional Economic Development, Department of Business, Tourism, Culture and Rural Development (BTCRD)
- Representative of the Atlantic Canada Opportunities Agency (ACOA)

The Tourism Board is supported by a Tourism Board Manager and a team of support staff from representative organizations. As a collective, the Tourism Board examines strategies to achieve the goals outlined within the Vision while support staff work together to implement the strategy. The balance between strategic thinking and on the ground implementation has been critical to the success thus far. However, nothing has been more critical than the unprecedented levels of partnership and collaboration that has been achieved through the establishment of Tourism Board processes and procedures. The private-public mix has generated a new way of working together that has helped align efforts in ways that will help advance the industry now and into the future.

“Aim not for what you are, but for what you could be.”

—Lucas Hellmer

*“Leadership is
the capacity to
translate vision
into reality.”*

— Warren Bennis



RENEWED DIRECTION: 10-Year Vision for Tourism

Vision

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

Target

Double the annual tourism spending in Newfoundland and Labrador by 2020 by attracting more visitors, getting them to stay longer and experience more.

Mission

Inspire travellers through authentic experiences that embrace our natural creativity, environment, and unique culture for the sustainable benefit of our people and our province.

Guiding Principles

The following principles are the foundation of sustainable tourism development that will guide us throughout our continued journey to 2020:

Respect for our Home. Develop tourism experiences that support, protect, and enhance a sustainable society, economy, and environment.

Respect for our Residents. Collaborate with tourism partners to garner our collective knowledge and experience for the benefit of our people and our province.

Respect for Travellers. Deliver appealing, memorable, and quality experiences for our travellers at every stage of their journey.

Respect for Profit. Make investment decisions based on the ability to sustain economic growth and prosperity in our province.

Respect for Communication. Commit to ongoing, positive, and constructive dialogue within our industry as a cornerstone for achieving our vision.

RENEWED FOCUS



Tourism in Newfoundland and Labrador: The Economy & Future Growth

In the last six years of Vision implementation, a lot has been learned. A changing economy has changed the environment in which the tourism industry operates. A diverse and complex industry, tourism impacts every region of Newfoundland and Labrador and positions the province as a great place to live, work and do business. Tourism services and attractions showcase our people and our place and enable residents and travellers alike to enjoy everything this province has to offer through experiences that are different and unique.

Newfoundland and Labrador has become known for untouched landscapes, pristine vistas, unique culture and traditional heritage. The delicate balance between growing visitor traffic and maintaining what is special about our destination, motivates us to ensure the use of sustainable tourism practices to drive tourism development. This is not only important for our natural and cultural environment, but also for the economic well-being of the industry and the people who invest in it. And, as an industry that employs over 18,000 people directly in tourism related jobs, mostly in small to medium sized enterprises throughout the province, tourism is an important part of the sustainability of rural Newfoundland and Labrador.

Our Vision for tourism focuses on providing travellers with memorable experiences. To do that, operators must be creative, innovative and develop experiences around unique offerings that appeal to travellers and, at the same time, generate income. The tourism industry must be positioned as a viable career option and one in which a good living can be made. As such, operators must be empowered with confidence to buy into the industry, make further investments and have a plan for succession when the time comes to retire and move on. Our tremendous marketing efforts have made Newfoundland and Labrador a well known, bucket list destination; now we must be prepared to convert desire into action and deliver on everything we have promised.

Tourism as an Economic Driver

Newfoundland and Labrador has shown strong growth and development in resource-based industries, however, throughout the years of Vision implementation, tourism has been further recognized as an industry that is a stable revenue generator that can add many benefits to the province. By showcasing our unique culture and heritage and using our natural landscapes to provide exciting and memorable experiences, the tourism industry is creating a place where people want to live, work and do business.

In 2014, non-residents accounted for approximately 45% of provincial tourism spending to contribute \$491.5 million to the provincial economy. The resident market, comprising approximately 55% of provincial tourism spending, is also a substantial component of our tourism industry. Together, resident and non-resident spending has consistently reached about \$1 billion or more since 2011. Tourism also continues to provide meaningful employment in both urban and rural communities with over 18,000 jobs attributed to various sectors within the tourism industry in Newfoundland and Labrador.

As oil prices fluctuate and create a variance of economic uncertainty, tourism is an industry in which strong investment is a smart move. As an industry that is comprised of approximately 2500 small to medium sized businesses throughout Newfoundland and Labrador in both urban and rural settings, investments that strengthen our tourism businesses help stabilize the economy and ensure the province remains strong by generating tax revenue to support vital services, such as health care, education and transportation.

“Progress is impossible without change, and those that cannot change their mind cannot change anything.”

—George Osmond Shaw

Market Context: Emerging Global Trends

Tourism is one of the fastest growing industries in the world with the demand for travel increasing along with competition from many new and emerging destinations. Through our wildly successful and compelling marketing campaign, Newfoundland and Labrador's brand awareness is higher than it has ever been. However, our future success depends on being able to convert interest from those thinking about visiting into those that actually make the travel decision to book a vacation.

Newfoundland and Labrador's long-term tourism sustainability is vulnerable due to the increasing dependency on resident travel. It is essential that we clearly understand what motivates non-resident travellers so that experiences, products and services can be tailored accordingly. However, with 90% of trips being generated from residents, the money generated from resident travellers is also significant to the overall economy of Newfoundland and Labrador and in moving towards the 2020 goal of \$1.6 billion in tourism spending. With that in mind, we must make every effort to attract more visitors, get them to stay longer and experience more.

To do this, we must be able to sell our unique products, services and experiences and we must also compete on quality. The expectations of all travellers are ever-increasing and as travellers become more aware of our brand promise, we must be able to deliver. Economic and regulatory conditions, such as the price of fuel, exchange rates and Visa regulations, will continue to impact the propensity of travellers to view Canada, and in turn, Newfoundland and Labrador as a realistic travel option. To maintain and grow our competitive position, Newfoundland and Labrador must address the following key emerging market trends:

Increased Global Competition.

An increasing number of global destinations that are well-funded, heavily advertised, and already well-known are vying for travellers' attention and their discretionary income. Global competition is strongly influenced by how much our competitors spend on marketing and the development of new products and experiences.

Online Planning and Booking.

The increased use of online and mobile devices is changing the way people research and book their travel, as well as the way they travel once they arrive at our destination. In 2014, 65% of travellers conducted trip planning online before making a travel decision while 85% of travellers used smartphones while on vacation. This trend means that it is imperative that businesses strategically think about and invest in technology to shorten the path to purchase.

Quality Service.

The delivery of quality products, services and experiences remains important. The demand for quality, value, and authentic experience has never been greater and while the Tourism Assurance Plan will help address some of these concerns, we must continue to make every effort to focus on quality and invest wisely to maximize our returns.

Environmental Sustainability.

The environmental concerns of travellers are causing an increased demand for sustainable approaches to preserve the natural and cultural heritage of our destination. As a province that has a diverse resource-based economy, ensuring the balance between growth, development and preservation will be important.

Changes in consumer behaviour and demographic shifts taking place in the wider market will also play a key role in future tourism trends. These include:

The Experiential Traveller.

An aging and active population, a trend in increased discretionary income, and a growing trend towards non-traditional households have all impacted people's leisure time and choice of activities. Travellers are seeking a deep emotional motivation to experience new people, cultures, and places, and the chance to discover something within themselves along the way. There is a growing demand for unique, high-quality experiences that are customized, engaging, and original, and that also have a sense of unpredictability and authenticity. Further, travellers are willing to pay premium prices for such experiences that are the alternative choice to the prepackaged, and oftentimes 'plastic' tourist destinations.

In an increasingly competitive marketplace, these emerging global trends present Newfoundland and Labrador with an opportunity to tap into the needs and desires of future travellers through the way we communicate with them, and through the unique experiences we offer.





Our Challenges & Opportunities

The continued development of a sustainable tourism industry will have far-reaching economic, social, and cultural benefits. With proper consideration, the tourism industry has the ability to generate substantial economic returns long after non-renewable resources have been extracted from our province. Given the current focus on resource-based industries and developments and the potential for fluctuations that will change our positioning as a province, now is the time to invest in tourism.

Addressing the challenges of urbanization is important to the tourism industry. The tourism industry needs rural communities. They are the heart and soul of our province, and the foundation of our travel experiences. Developing a tourism industry that provides rural opportunities for market entry, development and exit will help complete a business life cycle that is sustainable for those who wish to live and raise families in rural communities.

There are less than five years remaining to 2020, so, it is important that we recognize and capitalize on each and every opportunity and find new, creative ways to overcome challenges.

CHALLENGES

Travel Barriers.

Real and perceptual travel barriers obstruct our efforts to increase non-resident traveller visitation and tourism revenues for Newfoundland and Labrador. The reality is that it takes deliberate planning and determined effort to visit here. For Newfoundland and Labrador, there is no such thing as an accidental tourist.

Travel distance, travel time, travel cost, and travel access are significant barriers for visitors, and a major competitive disadvantage for our industry. While initiatives to extend the season have been ongoing and successful in some regions, most areas still experience a short peak season, capacity constraints during peak season, infrastructure and facility deficiencies, and underdeveloped tourism products and experiences.



Access Issues. Long-standing access issues must also be resolved as the cost, availability, and quality of air, land, and water access continue to be impediments to the growth of our industry. While we cannot control the business decisions relating to access, we can help identify and influence solutions based upon a collaborative business-case approach that is relevant for transportation partners and the tourism industry.

Long-term Sustainability of the Industry.

To ensure the tourism industry is here to stay in the long term, industry growth and development must further integrate the use of sustainable business practices. As the tourism industry ages, succession planning that will enable the successful transition of operators into and out of the industry will be essential to ensure the long-term viability of investments into public, private and not-for-profit organizations.

Heavy Dependence on Resident Traveller Traffic.

While visitation to the province has shown steady growth, 55% of tourism spending comes from resident travellers. Research shows that resident travellers are seeking the same products, services and experiences that non-resident travellers desire and are willing to pay the same amount as non-resident travellers. Continuing to hone in on the right target market will help us develop the industry based on the expectations of that target market and encourage the attraction of more visitors, regardless of resident or non-resident status.

Despite these formidable barriers and challenges, there are significant opportunities open to Newfoundland and Labrador; opportunities that we need to aggressively capitalize on to safeguard our industry and to ensure future growth and success.

OPPORTUNITIES

Path to Purchase.

Awareness of Newfoundland and Labrador is at an all time high. Provincial marketing efforts have put Newfoundland and Labrador on the global map and on the bucket list of people from all over the world.

To capitalize on our marketing success, now is the time to focus on encouraging travelers along the 'path to purchase' from awareness and interest to making definitive travel decisions by booking. The reality is that the travel barriers that always existed will continue to exist, meaning that a concerted effort will always have to be made to get here. The travel distance, time, and cost can be a part of a once in a lifetime journey, if positioned properly as part of the tourism experience. To do this, we must encourage potential travellers to make the investment of time and energy by making it easy for them to get information, understand as much as possible about travel to, from and within the province and book experiences.

Focus on Spending and Visitation.

With the ultimate goal of reaching \$1.6 billion in tourism spending by 2020, the strategic directions within the Vision address how we will reach our financial target and achieve success. To ensure we are making the right decisions for the long-term success of the tourism industry, we must measure our success on more than just tourism revenues by focusing on how to attract more visitors, get them to stay longer and experience more. By focusing on creating and maintaining demand, as well as appropriate yield management, we must develop a value mix that is appropriate for our target market and will move us toward the achievement of our goal.

Developing and Delivering Unique, Quality Experiences.

The Destination Development reports highlight opportunities for tourism development and put the spotlight on experience development as a priority for the province. Through research and industry consultation, the reports provide informed recommendations to grow the tourism industry and make it more sustainable. By focusing on the nuances of each region and linking them together for a provincial experience development plan that aligns with the provincial brand, we will be able to address components of each strategic direction.

Strategic Investment.

Now, more than ever, strategic investment is required to maintain Newfoundland and Labrador's appeal as a great place to live, work and do business, as well as an exciting place to experience. Partnerships that align and focus both government and tourism industry investment decisions will continue to be essential.

We must invest in training and educating ourselves in ways that will empower us to advance, expand, be more competitive and make wise investments in our industry.

We must also invest in developing and expanding upon tourism experiences that highlight our unique culture, heritage, and natural environment. We need to take advantage of the opportunities to deepen citizen and community engagement by giving everyone ownership of the value of tourism, while showcasing tourism as a vibrant and sustainable industry with dynamic entrepreneurial and employment opportunities for our people.

Meeting the challenges and seizing the opportunities to grow our industry requires strong leadership and solid partnerships between the public sector, business community, and the people of Newfoundland and Labrador.



RENEWING VISION 2020: Seven Strategic Directions



Vision 2020 establishes a number of priorities and broad actions to guide the development of Newfoundland and Labrador's tourism industry to 2020 through seven strategic directions. The directions provide focus for industry, government and all tourism stakeholders, clearly outlining where our collective effort should be placed if we are to achieve success in all areas of the Vision.

Over the last six years of Vision implementation, a great deal of work has been done towards the accomplishment of various goals and objectives within each of the strategic directions. As a collective, we are much more informed today than we were six years ago. We know a great deal more about what it will take to accomplish some of the goals and objectives outlined and we understand more about the environment we are dependent upon for our achievements. This renewed Vision will serve to reaffirm our commitment to our goals and objectives, but also to redefine them according to what we have learned and the environment in which we now operate.

Generally, many tourism industry challenges that were originally identified remain. And, in many cases, they will always remain as challenges that will require concerted effort, investment and reinvestment. It is important to recognize this as part of our reality, but, the challenges must still be faced head on. Strategic thinking must become a way of life in overcoming what we can and recognizing what needs to happen next in order to move forward.

Our renewed Vision reflects few changes to the seven strategic directions themselves. However, the changes to the goals and objectives within the strategic directions will enable a better focus on the approach we must take to reach the end goal.

One of the most notable changes is the increased focus on sustainability. By focusing on growing and developing the tourism industry in a sustainable way, we are ensuring the longevity of the tourism industry well beyond 2020. Each of the strategic directions must take on a sustainability lens to ensure smart decisions are being made that will carry us through the last few years of Vision implementation but also position us well as we look to the future.

The seven strategic directions within our renewed *Vision 2020* are:

- 1 STRATEGIC DIRECTION:
Private Public Leadership**
A Partnership for Tourism Growth & Development
- 2 STRATEGIC DIRECTION:
Sustainable Transportation Network**
A Transportation Strategy to Grow Our Industry
- 3 STRATEGIC DIRECTION:
Market Intelligence & Research Strategy**
A Framework for Accessible & Timely Research
- 4 STRATEGIC DIRECTION:
Experience Development**
Delivering Strategic & Sustainable Traveller Experiences
- 5 STRATEGIC DIRECTION:
Tourism Technology**
Strengthening Our Information and Communications Technology
- 6 STRATEGIC DIRECTION:
Marketing Our Brand**
Building on the Success of Our Creative Marketing Campaign
- 7 STRATEGIC DIRECTION:
Empowering Our People**
Growing Our People for a Dynamic Industry

These strategic directions are intended to guide the effort and investments made in the name of tourism and provide a platform for shared focus and unified action. Further collaboration will be required among all industry stakeholders and will continue to be a critical success factor that underpins all seven strategic directions.







1 STRATEGIC DIRECTION: Private Public Leadership

A Partnership for Tourism Growth & Development

Working towards our Vision for a prosperous tourism industry, one that will see the value of the sector doubled by 2020, has required a significant shift in thinking, and a transformation in the way government and industry work together. A great deal has been accomplished to this end with the establishment of the Tourism Board and the coordination of support staff that implement the strategy set by the Board.

Determining how to come together for a common goal has been an important learning experience for Tourism Board partners and the lessons learned must be used to engage other partners of the industry that are not represented at the Tourism Board table.

Communication to entities responsible for tourism, private, public and non-profit, are important because everyone has a role. Understanding roles and responsibilities as they pertain to the big picture will help advance the industry by using our resources more wisely. As such, Tourism Board partners need to be accountable for their roles as individual organizations but also as valued tourism partners. Alignment of strategies, operations and governance models will help ensure our efforts are collaborative and complimentary, and in a world of scarce resources, both human and financial, this is something we must figure out.

With a new level of collaboration possible, government, industry, and all stakeholders are empowered to champion the implementation of our *Vision* on the way to 2020.

The Tourism Board's immediate key priorities will be to:

Define and drive tourism investment and development decisions focused on tourism research, path to purchase, experience development, and quality and market readiness of products, services and experiences.

- Further align government and industry efforts by building strong linkages throughout provincial and federal governments; further define the roles, responsibilities, and financial support structures for our tourism organizations; develop closer links with local communities and regions; and strengthen the leadership capacity within our industry.
- Use every available communication tool and avenue to communicate *Vision 2020* and strengthen collaboration among stakeholders.
- The Tourism Board is a true private public partnership that uses consensus amongst partners to provide strategic direction towards the achievement of the Vision. The Board is responsible and accountable for the strategy that is advised and will ensure partner roles and responsibilities are carried out in the name of *Vision 2020*.

The Way Forward: Priorities & Actions for a Shared Leadership

For Newfoundland and Labrador to instill a shared government and tourism industry leadership model, the following is required:

| |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| GOAL 1.1 Continue the alignment of Tourism Board partners and tourism industry stakeholders to strengthen communications and engagement |
| Actions: |
| Reap the benefit of the defined roles and responsibilities of Tourism Board partners and industry stakeholders ensuring continued alignment of strategies for industry development. |
| Embrace best practices for governance and industry leadership for continued alignment of key tourism industry partners, not-for-profits and organizations to support Vision 2020. |
| Develop two-way communications and engagement processes with tourism stakeholders to regularly discuss Vision priorities and expectations. |
| Continue to release Vision 2020 Milestone Evaluations as a tool to measure progress towards Vision goals and to ensure partner accountability. |
| GOAL 1.2 Be a visible leader of responsible, sustainable tourism development |
| Actions: |
| Support industry leadership, learning and development through the identification and implementation of best practices that enable businesses to grow their experience offerings in ways that will enable long-term growth and independence. |
| Establish the foundation for effective succession planning for the tourism industry through better alignment of programs, services and communications that inform and prepare those wanting to enter or exit the industry. |

2 STRATEGIC DIRECTION: Sustainable Transportation Network

A Transportation Strategy to Grow Our Industry

For Newfoundland and Labrador, there's no such thing as an accidental tourist. It takes deliberate planning and determined effort to visit here.

Transportation issues will always present challenges for the tourism industry, amongst other industries. The very nature of Newfoundland as an island, and Labrador as an enormous, sparsely populated land mass, positions the province as one that will always have to make a concerted effort to address transportation challenges. While gains have been made within Strategic Direction 2, travel to, from, and within the province, whether by sea, air, or road remains constrained by issues of affordability, capacity, infrastructure, and quality.

To compete effectively in an increasingly aggressive global market, we need the ability to bring travellers to the province in an easy, cost-effective, and pleasurable manner – by sea, by air, and by land. Within the tourism industry, there is a greater understanding than ever about the important role of transportation providers as more than just people movers. This broader understanding has enabled movement towards making transportation part of the traveller experience within the Newfoundland and Labrador journey. By making transportation part of the experience, we eliminate the need for everything to be perfect; however, in this case, communication and awareness become even more important. As travellers plan their vacations, it is imperative that they know what their travel options are and have all the information they need to feel comfortable about the reliability and quality of their transportation arrangements.

Although communications and awareness can position transportation options differently, further gains must be achieved if we are to stimulate inbound tourism as a means of growing our industry in the remaining years to 2020.

Access by Air.

Air passenger travel accounts for approximately 75% of non-resident visits each year with an increase in air travel being shown year over year. The expansion of St. John's airport and the addition of routes in various airports throughout the province support the propensity for air travel. Linked to air access, however, is the availability of rental vehicles and ground transportation options, as many of those that travel by air also require additional transportation options once they arrive.

Access by Land & Sea.

Recent years have seen a decrease in the number of visitors arriving by sea and road. The cost to travel by ferry to the province is increasing and Marine Atlantic Inc. is experiencing declining passenger traffic. Visitors by sea and road tend to stay longer and spread the benefits of tourism to our rural communities and regions. Ensuring strength in this market segment will require significant coordination of effort from all sectors of government and industry to support the strategic development of our ferry services as one of our most vital links.

In-Province Infrastructure.

Well-developed and efficient in-province transportation infrastructure must also complement overall ease of access to our destination. This includes well-maintained roads, adequate road and directional signage, public transport, and other infrastructure to meet the needs of travellers. The maintenance and construction of such infrastructure will always present challenges that require concerted efforts to overcome. Strategic thinking and investment will be required to ensure infrastructure supports the ease of travel within the province and meets visitor needs to support future growth.

The Way Forward: Priorities & Actions for a Shared Leadership

To address the access, capacity, and efficiency gaps that exist in our transportation infrastructure, the following actions must take place:

| |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| GOAL 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 |
| Actions: |
| Work with regional airport authorities, provincial ferry providers and Marine Atlantic Inc. to create a better sense of arrival and departure that will complement the journey as part of the tourism experience. |
| Continue to work with car rental agencies & ground transportation providers to communicate options, address capacity and improve services provided to visitors. |
| Work with Transportation and Works to ensure the provincial ferry system evolves with a tourism lens, with particular emphasis on reservations, communications and customer service. |
| Pursue transportation partnership options to enable increased capacity. |
| GOAL 2.2 Ensure efficient and easy travel in and around the province |
| Actions: |
| Implement tourist-oriented directional signage (TODS). |
| Continue to support the enhancement of major traffic routes, including the Trans-Labrador Highway, for multi-sector development. |
| Support operators to increase the uptake of navigation technology. |
| Enhance information to travellers about transportation options prior to arrival in a manner that enables travel to, from and within the province to be part of the travel experience. |

3 STRATEGIC DIRECTION: Market Intelligence & Research Strategy

A Framework for Accessible & Timely Research

The availability of timely tourism research is paramount for the advancement of the tourism industry. As more and more tourism operators professionalize their businesses, research is needed to build business cases for entry, expansion and renovation, as well as for succession planning that will ensure the strength of the industry remains for the long term.

Since the inception of the *Vision* in 2009, the tourism research division of the Department of Business, Tourism, Culture and Rural Development has produced a great deal of research and has helped the industry learn more with each release. As we move closer to the 2020 goal, it is important that the research be as specific and relevant to tourism operators as possible so that the most gains can be produced.

There are also research partnerships that can be achieved by working with Tourism Board partners and other stakeholders. Various entities have a research capacity that are not currently aligned with or realized for the *Vision*. By taking advantage of existing opportunities, further research capacities may be discovered. Further utilizing partnerships to complement the provincial research strategy will help produce additional information that is relevant for operators and Tourism Board partners. In addition, extra efforts to ensure the interpretation and communication of research will enable industry and government alike to assess where investments should be made. and meets visitor needs to support future growth.



The Way Forward: Priorities & Actions for a Shared Leadership

To ensure accessible, timely, high-quality market intelligence and tourism research relevant to future planning and growth, the following actions must take place

GOAL 3.1

Develop and implement a collaborative tourism research strategy and targeted research investments that provide industry and government with relevant and timely information

Actions:

Identify and prioritize research initiatives in the areas of market trends and opportunities, changing traveller profiles, and consumer behaviours.

Enhance research capabilities through the development of research partnerships with academic institutions and other traditional and non-traditional partners, including industry.

GOAL 3.2

Regularly communicate tourism research and ensure timely and relevant interpretation for tourism stakeholders

Actions:

Communicate research findings in a timely manner to support sound business decisions.

Utilize in-person and online communication tools to assist with the interpretation of traditional and non-traditional tourism research based on the needs of tourism stakeholders.



4 STRATEGIC DIRECTION: Experience Development

Delivering Strategic & Sustainable Traveller Experiences

Strategic Direction 4 has garnered a lot of attention in the last few years of Vision implementation. The focus on experience development has reinforced the need for us to change the way we think about product development to focus more on building experiences that align with the brand and authenticity of Newfoundland and Labrador. We know that personal touches and hands-on opportunities create memories that will serve so much more than the functional aspects of the product offering and the research backs us up. But, the value of quality cannot be understated. As a destination that requires concerted effort to visit, the quality of experiences must match the expectations of the sophisticated travellers that we attract.

Destination Development

The destination development planning process provided the opportunity to critically consider recommendations for product and experience development within each region of the province. By using the regional plans to form a provincial product and experience development strategy, we are well positioned to make regional and provincial linkages that will engage many tourism partners and align our collective resources on priorities for developing a sustainable tourism industry for the long term.

Partners of the Tourism Board have committed to the destination development process and responded to industry's desire to see action. Implementation of the plans has begun and industry partners have been engaged in initiatives as a direct result of the recommendations from the plans. However, the plans are designed for complete implementation to take place over the long term and as a result, continued engagement with and communications to all industry partners will be critical.

Tourism Assurance Plan (TAP)

The Tourism Assurance Plan (TAP) is an industry driven initiative to help raise the bar for the quality of tourism products, services and experiences in Newfoundland and Labrador. Launched in 2013 at Hospitality Newfoundland and Labrador's Annual Conference, TAP approval reached 70% in the first year of implementation in 2014. With five minimum standards, the program highlights the importance of quality and meeting the expectations of the traveller.

Tourism Board partners have committed to the program and the further work that must be done to continue to educate and coach non-approved operators towards approval. Further work will also be done to engage other sectors of the tourism industry and continue to focus on quality standards.

Fundamentally, the priorities for experience development are:

- Ensuring a critical mass of authentic, quality attractions and experiences with supporting infrastructure and services in the right locations, to respond to market demands and expectations.
- Developing extended season tourism demand to help achieve sustainable, viable tourism experiences that will grow the industry over the long term.
- Establishing a realistic financial model so our demand-generating experiences can be sustainable.

The Way Forward: Priorities & Actions for a Shared Leadership

To ensure the development of strategic and sustainable tourism experiences, the following actions have been identified:

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| GOAL 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 |
| Actions: |
| Leverage the destination development plans to concentrate efforts with partners to support the development of authentic, creative and innovative tourism products and experiences that align with the NL brand promise, meet market demand and reinforce and sustain our natural and cultural assets. |
| Develop sustainable funding models that support authentic, creative and innovative tourism product and experience development. |
| Implement a set of Tourism Resource Management Principles, including an environmental code of conduct that balances the needs of the tourism industry with other resource-based industries to ensure protection and preservation of our natural landscapes. |
| GOAL 4.2 Continue to improve the infrastructure, activities and programs that will increase the appeal of the destination |
| Actions: |
| Develop an infrastructure investment plan for Newfoundland and Labrador. |
| Examine the sustainability of existing tourism infrastructure, including anchor attractions as important demand generators and how quality, experience and service levels can be enhanced to meet the expectations of travellers. |
| GOAL 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 |
| Actions: |
| Continue to work with and support Destination Management Organizations (DMOs) and other tourism stakeholders to enhance market-readiness of experiences and products that meet market demand and deliver on the brand promise. |
| Work with quality assurance partners to provide support to tourism operators that will enable high quality products, services and experiences to thrive in the market. |

5 STRATEGIC DIRECTION: Tourism Technology

Strengthening our Information & Communications Technology

Technology plays a vital role in the way business is conducted. Leveraging technology can enable competitive advantage and our economic success as a leading tourism destination.

Technology is ever-changing and has become an absolute necessity in meeting traveller needs. The use of mobile devices impacts the way travellers research and book travel, but also how they navigate and make plans once they arrive at their destination. Over the last number of years, advances in broadband infrastructure have strengthened travellers' ability to use technology throughout the province. Continuing to develop the infrastructure to ensure all parts of rural Newfoundland and Labrador have available Internet access for business development, as well as traveller use, will be important.

The re-launch of TourismTechnology.com and the launch of the provincial Skills and Knowledge Action Plan will enable tourism operators to access technology information and training through various programs and mediums. Now, more than ever, tourism operators have the ability to implement technology strategies that will have a direct impact on their bottom line from engagement, to purchasing, to experience delivery.

Connectivity within the industry is essential. Without it, our tourism sector cannot remain competitive in the rapidly changing online environment. Increasing technology infrastructure and encouraging tourism operators to adopt technology best practices will enable effective linkages among all stakeholders.



The Way Forward: Priorities & Actions for a Shared Leadership

To develop a modern and strong information technology infrastructure within our tourism industry, the following actions need to take place:

GOAL 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

Actions:

Encourage tourism operators to use existing and emerging technology solutions to increase business efficiencies, competitiveness and profitability.

Leverage existing and emerging technology as an industry networking and information source.

Develop and implement the means to support a significant transition from static and physical services to more animated and interactive technology-based services.



6 STRATEGIC DIRECTION: Marketing Our Brand

Newfoundland and Labrador's 'Find Yourself Here' campaign has been hugely successful in positioning the province as a unique and exotic destination. Having continued to win major national and international awards, the campaign has brought unprecedented levels of awareness of Newfoundland and Labrador in our target markets.

Our target remains on the explorer market – sophisticated travellers looking for a natural and exotic experience 'off the beaten path'. A visit here is a chance to meet our people, to interact with our dramatic and remarkable landscape, and to experience the creativity of our culture first-hand. The marketing campaign showcases who we really are – a natural, yet surprisingly exotic destination that goes beyond the packaged, 'plastic' tourism experience of so many other destinations. It is the combination of our people, our culture, and our dramatically rugged landscape that gives Newfoundland and Labrador its unique position as a tourist destination.

We need to build on this success and convert interest into increased visitation. The marketing partnerships that have been created amongst tourism partners and individual tourism operators have enabled us to leverage our collective time and resources. Our marketing and research efforts have given us a good understanding of travellers' needs and wants, and their destination decision-making criteria. It is now up to us to provide them every opportunity to move easily through the path to purchase so more of those interested in visiting arrive on our doorstep. By using new marketing mediums and taking advantage of technology to reach travellers in mobile-friendly ways, we must leverage the excitement we have created.

In addition, it remains important to equip our tourism industry and individual operators with the necessary brand tools and marketing support to reinforce the brand at all levels of visitor engagement, and translate into the development and expansion of consistent experiences that meet visitor expectations.

Delivering a consistent brand message and experience at all levels of the tourism sector will help differentiate Newfoundland and Labrador from competing tourism destinations. Providing potential travellers with the chance to react immediately to the emotions our marketing stirs within them will move us further towards the visitation levels required to meet our 2020 goals.

The Way Forward: Priorities & Actions for a Shared Leadership

To build on the success of our marketing efforts for future growth, the following actions have been identified:

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| GOAL 6.1 Continue to build a successful, differentiated tourism brand and leading tourism marketing position |
| Actions: |
| Continue to develop partnerships to appeal to traveller demands and market opportunities. |
| Ensure resources receive continual investment to build on market opportunities and to tap into key market segments. |
| Leverage our marketing resources through beneficial relationships with federal and provincial agencies and departments. |
| GOAL 6.2 Identify and pursue new and emerging market opportunities |
| Actions: |
| Implement a multi-year strategic marketing plan that will complement the overarching tourism strategy. |
| Actively assess the evolution of new marketing tools and technology advances that ensure Newfoundland and Labrador remains a leading destination. |
| GOAL 6.3 Expand marketing partnership 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 |
| Actions: |
| Work with industry partners to align marketing and advertising efforts that 1) brings the creativity of our people and culture to life, and 2) helps build proprietary brand differentiation. |
| Continue to work with Destination Management Organizations (DMOs) and other tourism stakeholders with marketing mandates to streamline marketing efforts to minimize duplication, and maximize our collective brand voice and impact. |
| Maximize the provinces heightened levels of awareness to focus on the path to purchase as a means of attracting more visitors, getting them to stay longer and providing opportunities for them to experience more. |

7 STRATEGIC DIRECTION: Empowering Our People

Growing Our People for a Dynamic Industry

Who we are is an intangible addition to the experience of travellers to this province. From the chance happenings with unique characters to the experiences provided, the people of this province are an invaluable asset for the tourism industry. As a highly labour-intensive, service-based industry, tourism requires a strong labour force and sophisticated business community to ensure tourism growth and development.

The most recent statistics tell us that the tourism industry in Newfoundland and Labrador is made up of 2500 tourism businesses and employs over 18000 people. We must empower these people to be a unique part enhancing the Newfoundland and Labrador experience. Every interaction a traveller has provides the potential to create a lasting memory and contributes to our long-term sustainability. Unique, authentic and informative discussions with locals have been cited as some of the best experiences travellers have along their journey. We must do more.

To achieve the growth outlined in *Vision 2020*, and to meet the evolving needs of travellers, our sector needs skilled, knowledgeable employees and business people. Offering superior training and business development support opportunities is the way to ensure this. Our people and communities must have access to the learning opportunities they need to advance their experiences and understand the importance of their own roles in building our unique brand of service.

The province's tight labour market makes it difficult for operators to attract, retain, and train good people. A shrinking replacement pool due to a declining birth rate and a retiring generation of baby boomers, out-migration to other jurisdictions with higher wages, and competition with other industries for skilled workers are just a few of the challenges facing the sustainability of the tourism labour force.

The people of Newfoundland and Labrador and their role in the tourism industry also present a position of strength. There is a growing appreciation of the value of tourism within the province as a critical link that makes Newfoundland and Labrador a good place to work, live and do business. Therefore, the value of tourism can be seen amongst residents, the business community and travellers to the province. By building a sustainable industry that showcases our natural friendliness, warmth, hospitality, and character, we are contributing to a society that provides memorable and differentiated experiences for our travellers.

The Way Forward: Priorities & Actions for a Shared Leadership

To empower our people with the skills and knowledge they need to provide authentic hospitality and experiences to travellers, the following priorities and actions have been identified:

GOAL 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

Actions:

Establish key messaging that empowers our people – entrepreneurs, employees, volunteers, residents – to deliver on the brand promise by being authentic when developing and delivering quality services and experiences.

Implement a marketing strategy that highlights tourism as a dynamic industry with consistent, viable career and entrepreneurial opportunities that rival competing industries and showcases this place we call home.

GOAL 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

Actions:

Foster and support the provincial skills and knowledge action plan for attracting, training and retaining a skilled tourism workforce; and for actively aligning with education and training providers.

Support tourism operators through the TourismTechnology.com program to become market ready with online technology, digital marketing tools and online booking services.

Provide employers and employees with professional development opportunities to meet the industry occupational standards to improve the quality of products, customer service and visitor experiences.

THE JOURNEY CONTINUES



The sustainability and growth of the tourism industry provides benefits far beyond the tourism sector. By providing experiences, products and services that showcase our nature, culture and unique sense of place and people, we are building an industry that contributes significantly to the economic well-being of Newfoundland and Labrador.

With partnership levels at an all time high and a focus on the entire province, both urban and rural, we are well positioned to continue our work on initiatives that have already been set in motion and determine how we can advance our goals together.

Our continued success with our award-winning tourism marketing campaign has created an unprecedented awareness of Newfoundland and Labrador. As initiatives like the Tourism Assurance Plan and the Destination Development processes help us raise the bar on quality and expand upon our offerings, we are at a pivotal point for even more significant advancements in the industry. Our connection as a province, made up of five distinct regions with unique offerings, creates a story that will motivate and inspire. We have the tools to build upon our strong foundation as we surge towards our goals for 2020.

Renewing *Vision 2020* ensures that we are focused, as Tourism Board partners, but most importantly as a collective industry. The goals for 2020 must be those of the collective if we are to understand our role in helping achieve them. Renewed strategy and focus will ensure that we understand the challenges ahead and what must be done to overcome them. All partners of the Tourism Board understand the importance of working together and using our available resources wisely if we are to develop the tourism industry for long-term success. Moving forward, the Tourism Board will continue to expand their reach to tourism partners, as so many have a critical role in defining the future for tourism.

Our continued journey to 2020 is clearly in our sights. With only a few short years remaining, we understand the value the tourism industry can bring to the province. The time for action is now and we must rally together to drive every discovery that will help make us great.



*“A goal without a
plan is just a wish.”*

— Larry Elder







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