

The Way Forward

2017-20 Provincial Tourism Product Development Plan





Table of Contents

Introduction	Page 2
Mission.....	Page 4
Goal.....	Page 4
A Provincial and Regional Collaboration Framework	Page 5
2017-20 Provincial Tourism Product Development Plan	Page 6
Creating and Delivering Brand Experiences: People and Program-Based.....	Page 9
People and Program-Based.....	Page 12
Sense of Arrival	Page 14
Visitor Services	Page 16
Food.....	Page 17
Accommodations.....	Page 18
Natural and Cultural Attractions.....	Page 19
Festivals and Events.....	Page 20
Destination Trails	Page 21
Craft and Arts	Page 22
Indigenous Tourism	Page 24
Shoulder and Winter Seasons	Page 25
Enhancing Tourism Market-Readiness.....	Page 26
Collaborating to Compete.....	Page 28
Understanding Value and Success.....	Page 30

Introduction

Together, industry and government will build high quality, people and program-based tourism experiences that attract more visitors, encourage them to stay longer and experience more of our province. By leveraging Newfoundland and Labrador's iconic brand of people, place and culture, the tourism industry will build higher differentiation and higher yield experiences that will increase tourism visitation and spending.

By 2020, Newfoundland and Labrador annual tourism spending by residents and non-residents will be double 2009 levels. This plan outlines how to achieve this target.

The Way Forward

Launched in 2009, Uncommon Potential: Vision 2020 set a target of doubling tourism spending by 2020 (2009 baseline). At that time, the tourism industry contributed \$790 million to the economy and supported almost 13,000 direct jobs. Since then, tourism has grown to generate about \$1 billion in visitor spending each year and is responsible for over 18,000 direct jobs. The Provincial Government remains committed to reaching a target of \$1.6 billion in resident and non-resident visitor annual spending by 2020.

This plan is focused on helping the provincial tourism industry achieve its goal of increasing resident and non-resident visitor spending, as this will grow the economy and support private sector job creation – a focus of government's The Way Forward vision. Achieving all the industry development targets and infrastructure plans in The Way Forward will support an average of 14,000 person years of employment annually in Newfoundland and Labrador.

This Tourism Product Development Plan speaks to guiding principles and focus areas established in The Way Forward, such as:

- **Collaboration** - The plan outlines a whole-of-government approach to collaboration across the public sector with departments and agencies that play a role in or offer programs and services that impact tourism product development. The plan will also be achieved through a collaborative approach with private and non-profit partners.
- **Greater Efficiency** - The actions outlined will enable us to accurately and efficiently focus resources on collective tourism priorities that improve the tourism industry's ability to achieve established targets for spending growth.
- **Better Services** - The plan outlines new opportunities for service improvements, collaboration and significant economic growth. These are tangible initiatives that allow all tourism partners to engage in strategic tourism product development to achieve specific outcomes.

- **Better Outcomes** - The plan outlines the primary goal of increasing tourism visitation and spending, which produces better outcomes for all tourism stakeholders.

The goals, objectives and actions of the Provincial Tourism Product Development Plan outline a plan for creating a strong business environment for private tourism investment and focusing public resources in product development areas that provide the greatest return on investment through increased visitation and spending.

Uncommon Potential: A Vision for Newfoundland and Labrador Tourism – Vision 2020

The goal of reaching \$1.6 billion in annual tourism spending by 2020, under the guidance of Uncommon Potential: A Vision for Newfoundland and Labrador Tourism (Vision 2020), is complex and requires a collaborative effort among private, government and non-profit tourism stakeholders in seven strategic areas:

1. Private-Public Leadership
2. Sustainable Transportation Network
3. Research Intelligence
4. Experience Development
5. Marketing our Brand
6. Technology
7. Empowering our People

The Provincial Tourism Product Development Plan, a commitment of the The Way Forward, supports Vision 2020 priorities for growing tourism visitation and spending. Through the collaborative entity of the Newfoundland and Labrador Tourism Board, private and public tourism partners identified the need for both provincial and regional tourism development plans to help focus and guide tourism stakeholders in their product investments. A Destination Development Planning process created regional plans for the five tourism destination regions: Labrador, Western, Central, Eastern and St. John's/Northeast Avalon. All five Destination Development Plans were developed through an intensive Tourism Destination Visitor Appeal Appraisal and substantial stakeholder consultation, analysis and prioritization. All five regional Destination Development Plans are supplemental to the Provincial Tourism Product Development Plan. Initiatives will be implemented through integrated regional and provincial work plans that are linked to the four areas of focus. The five regional Destination Development Plans can be viewed here http://www.tcii.gov.nl.ca/tourism/tourism_development/regional_tourism_support.html. An action plan outlining the timeframes and priorities for 2017-20 will also be available.

The tremendous level of analysis, consultation and strategic planning among tourism stakeholders and partners during regional Destination Development Planning has produced the provincial level areas of focus that form the Provincial Tourism Product Development Plan. The Provincial Tourism Product Development Plan was completed by the Department of Tourism, Culture, Industry and Innovation in partnership and consultation with private tourism businesses, non-profit operators, municipalities, regional and other tourism sector organizations, Destination Management Organizations, Hospitality Newfoundland and Labrador, the Atlantic Canada Opportunities Agency, Parks Canada, and many other tourism, culture and transportation partners.

MISSION

The Provincial Tourism Product Development Plan provides an overview of the four areas of focus that will enable strategic private and public investment in tourism development for Newfoundland and Labrador to reach \$1.6 billion in visitor spending by 2020. Together, private, government and non-profit tourism partners will increase the number of high quality, Newfoundland and Labrador 'brand' tourism experiences to attract more visitors, encourage them to stay longer and experience more.

1. Creating and Delivering Brand Experiences: People and Program-Based
2. Enhancing Tourism Market- Readiness
3. Collaborating to Compete
4. Understanding Value and Success

GOAL

The goal of the Provincial Tourism Product Development Plan is to guide and support the development of high quality, visitor-focused Newfoundland and Labrador brand experiences to double resident and non-resident visitor spending by 2020 to \$1.6 billion.

This goal will be achieved through a collaborative approach among tourism stakeholders and partners to achieve experience development priorities in Newfoundland and Labrador.

Create and deliver Newfoundland and Labrador brand experiences that:

- Attract more visitors**
- + Encourage them to stay longer**
- + Experience more**

= Increased visitation and spending

\$1.6 billion by 2020

A PROVINCIAL AND REGIONAL COLLABORATION FRAMEWORK

The Provincial Tourism Product Development Plan is a collaborative approach that aligns private, non-profit and government tourism partners around provincial priorities, while integrating regional priorities from the five Destination Development Plans.

Of particular importance in the collaboration framework is the role that private, non-profit and government entities play in creating and delivering Newfoundland and Labrador brand experiences. As the operators of tourism attractions and services, all three stakeholder groups play the most important role of providing experiences directly to visitors. They are the main agents in advancing the quality and market-readiness of tourism experiences that will lead to increased visitation and spending growth.

The priorities from the regional plans are being implemented by executing initiatives and projects through regional networks, task teams and partnerships, under the direction of Regional Destination Development Plan Implementation Committees. All priorities from the regional plans are aligned with provincial level areas of focus, with priority initiatives being actioned through an integrated approach, leveraging both provincial and regional capacity to achieve common goals.

The Tourism Board represents all tourism partners and oversees the strategic advancement of Vision 2020 and will also provide guidance on the implementation of the Provincial Tourism Product Development Plan as it relates to Vision 2020's Strategic Direction 4: Experience Development. The members of the Tourism Board include private sector representatives from Hospitality Newfoundland and Labrador and the five Destination Management Organizations, which include Legendary Coasts of Eastern Newfoundland, Destination Labrador, Go Western Newfoundland, Adventure Central Newfoundland and Destination St. John's, and government representatives including the Department of Tourism, Culture, Industry and Innovation and the Atlantic Canada Opportunities Agency. All of these organizations play a leadership role as enablers of a fertile business environment, performing roles in tourism marketing, sales, research, market-readiness, policy, programming and tourism product development.

2017-20 Provincial Tourism Product Development Plan

In addition to the priorities from the five regional Destination Development Plans, there are four collective provincial areas of focus that will be implemented in the Provincial Tourism Product Development Plan.

1. **Creating and Delivering Brand Experiences: People and Program-Based**
2. **Enhancing Tourism Market-Readiness**
3. **Collaborating to Compete**
4. **Understanding Value and Success**

Four Provincial Areas of Focus



The **Visitor Journey** is central to the Provincial Tourism Product Development

Plan. Every visitor journey is different in Newfoundland and Labrador, from the mode of transportation they use to the services they require and attractions they want to experience. By using the main touchpoints along the visitor journey - transportation, visitor services, food, accommodations and things to experience - all partners can focus attention on delivering on the Newfoundland and Labrador brand promise to the most important people in the equation: visitors. By framing priorities around the central character, tourism partners are establishing primary investment areas requiring the most immediate attention to enable individual business and provincial economic goals, while always being mindful of the needs of customers.

The first and primary focus of the Provincial Tourism Product Development Plan is [creating and delivering people and program-based brand experiences](#).

- People and program-based experiences engage visitors with locals, through programming of authentic experiences around Newfoundland and Labrador's most special natural and cultural icons, attractions, activities, food, music, theatre, stories, arts and craft.
- These are experiences that celebrate Newfoundland and Labrador's unique brand of people, place and culture.
- Leveraging existing tourism infrastructure and assets to build higher differentiation and higher yield experiences will increase visitor demand, longer stays and tourism spending.

At the same time, [enhancing tourism market-readiness](#) enables all operators to meet the expectations of visitors throughout their vacation experiences in Newfoundland and Labrador.

- Enhancing tourism market-readiness of operators throughout the key touchpoints on the visitor journey from the planning stage on through to arrival and departure is critical.
- In order to deliver brilliantly on the Newfoundland and Labrador brand promise and increase value and appeal in core markets, tourism operators need to make strategic investments that meet and aim to exceed the expectations of visitors.

It is also critical that partners are [collaborating to compete](#) by developing differentiated attractions, activities and experiences throughout the province and agreeing on further collective and strategic investment priorities for tourism development in communities, regions, networks and clusters.

- Collaborating for high quality itineraries and packages that link the appeal of attractions and experiences, such as cultural sites or trail experiences, to Newfoundland and Labrador's target markets will encourage visitors to have longer stays and experience more.
- Collaborating to leverage travel demand-generating attractions will support experience development throughout the visitor journey and enable focused action towards priorities that increase visitation and spending.

[Understanding value and success](#) in the eyes of the visitor enables all stakeholders to adapt to reflect visitors' value expectations and reach provincial tourism spending potential.

- It is important that tourism stakeholders collaborate to continuously gain a deeper understanding of visitors so that Newfoundland and Labrador continues to evolve in a competitive global marketplace.
- While the ultimate measure of success is increased visitation and spending, it is also critical to understand and define success along the way.
- Enhanced collaboration in research priorities that measure progress and success in offering more brand experiences, increasing market-readiness and demonstrating more return on investments will illustrate collective achievements.



FOUR PROVINCIAL AREAS OF FOCUS

1. Creating and Delivering Brand Experiences: People and Program-Based



Provincial tourism product development and regional destination development planning, solidified a clear understanding that visitors in Newfoundland and Labrador do not simply want to see the sights. They value deep engagement with locals, as well as gaining an understanding of the character of the people and places they visit. The opportunity for tourism growth exists in telling the Newfoundland and Labrador story directly and effectively to visitors through high quality tourism experiences that celebrate people, place and culture.

As defined in each of the regional Destination Development Plans, the ability to increase the benefits from tourism will be enhanced by understanding and raising the bar on the value of tourism experiences. By focusing tourism product development efforts towards increasing the level of personal engagement with visitors, providing deeper connections to people and place and knowing what various visitor types value, the tourism industry will be enhancing its competitive positioning. Steadily growing demand and tourism volume will enable operators to grow their experiences into premium, high yield product offerings.

Visitors value the emotional connection they have with the people, place and culture of Newfoundland and Labrador. By creating or enhancing people and program-based experiences, the tourism industry is providing greater differentiation and access to the experiences that are offered; thereby, increasing engagement with visitors and enhancing the emotional connection they feel. This provides an enhanced return on emotion, which is reflected in the perception of the value of their Newfoundland and Labrador travel experiences.

Strategic tourism development investment is required along the key touchpoints of the visitor journey in different ways. There are three layers of tourism services and attractions in Newfoundland and Labrador, which are:

1. **Infrastructure-based** businesses/operations. For example: accommodations, museums, historic sites, parks, trails, theatres, restaurants, transportation, visitor information centres, meeting, convention and sports facilities and large tour operators who own transportation.
2. **Activity-based** businesses/operations. For example: tour companies, boat tours, whale watching or kayaking companies and outfitters.
3. **People and program-based** businesses/operations. For example: natural and cultural people-based programming, guiding and tour companies, festivals and events, storytellers, writers, craftspeople, artisans, musicians, etc.

Together, these three layers provide the foundation of attractions, services and experiences that will grow visitation and spending. All will be required to tackle systemic challenges like season extension and sustainability, as well as deliver people and program-based brand experiences. Focused efforts ensure that:

- Existing private businesses and potential new entrepreneurs are equipped with the business development support to enhance their market-readiness, experience development and profitability.
- Existing non-profit natural and cultural attractions that are travel demand generators are equipped with the capacity to be sustainable and potential new non-profit attraction developments are strategically prioritized; and,
- Public operators, such as municipal, provincial and federal governments that are the operators of the province's most iconic natural and cultural attractions, transportation and visitor services, play a crucial role in attracting visitors and delivering on the Newfoundland and Labrador brand promise. These public attractions and services also enable a strong business environment through policy, program and investment resources that encourage private businesses to be profitable and non-profits to be sustainable.

It is critical for Newfoundland and Labrador's long-term tourism growth potential that all types of tourism services and attractions advance toward common goals and priorities in tourism development and delivery of high quality Newfoundland and Labrador brand experiences.

There is a common set of activities that will drive people and program-based experience development priorities, which involve research, product development and marketing. Encouraging visitors down the 'path to purchase', getting them to stay longer and experience more, means taking an integrated approach to understanding, creating, promoting and delivering experiences through coordinated efforts in research, product development and marketing.

With a focus on [creating and delivering brand experiences](#) across all touchpoints along the visitor journey, the following sections outline the objectives in strategic areas:

- [People and Program-Based Experiences](#)
- [Sense of Arrival](#)
- [Visitor Services](#)
- [Food](#)
- [Accommodations](#)
- [Natural and Cultural Attractions](#)
- [Festivals and Events](#)
- [Destination Trails](#)
- [Craft and Arts](#)
- [Indigenous Tourism](#)
- [Shoulder and Winter Seasons](#)



People and Program-Based Experiences

Increase the number of people and program-based brand experiences in core experiences categories.

Tourism product development will be focused on tourism experience development. This will be achieved by leveraging iconic natural and cultural attractions and existing infrastructure and activities to build higher differentiation, higher yield experience offerings and creating and delivering more people and program-based brand experiences. These experience offerings will focus on Newfoundland and Labrador target markets. People and program-based experiences are those that offer deep engagement with locals and an understanding of the character of the people and places they visit.

Focus on people and program-based brand experience development

Destination development and provincial tourism product development planning, enabled stakeholders to identify specific experience opportunities to target for people and program-based development. All of these experience opportunities have government networks that can be drawn on to establish and achieve common, collective and individual tourism development goals. The number of people in Newfoundland and Labrador with exceptional local knowledge, local stories, craft and arts talent provides extensive opportunities to build diverse and differentiated people and program-based experiences that embody the provincial tourism brand of people, place and culture.

Provide experience development and market-readiness support

There are specific activities that will enable provincial and regional tourism experience development priorities to be achieved.

These are:

- Experience development support, education and mentoring;
- Tourism market-readiness, best practices and innovation;
- Season extension and visitor journey lens to tourism priorities;
- Focused investment and policy effort in priority areas;
- Experience networks, partnerships and collaborations; and
- Anchor attraction clusters/non-profit attraction sustainability.

Actions:

1. Focus on experience supply gaps and opportunities as identified in Destination Development Plans to inform experience development priorities and initiatives in collaboration with tourism organizations, stakeholder networks and partners.
2. Create and deliver Newfoundland and Labrador brand experience tools for people and program-based development in key experience categories, including market-readiness and mentoring tools.
3. Provide experience and business development, market intelligence, market-readiness, best practices and investment support to tourism operators, organizations and potential entrepreneurs starting, developing and enhancing brand experiences.
4. Create collaborative linkages among key influencer organizations, such as provincial and federal government departments and agencies and other tourism/transportation partners that are leading and supporting tourism development and investment to focus policy, programs and services.
5. Enhance promotion of people and program-based brand experiences by collaborating on provincial, regional and other marketing partnerships, and identify ways to leverage brand experience networks for marketing partnerships, packages and itineraries.



Sense of Arrival

Improve the sense of arrival at major provincial entry gateways and throughout key touchpoints along the visitor journey.

A sense of arrival is the welcome and warmth that visitors feel once they have reached their destination. Ideally, this sense of arrival is in keeping with the perceptions generated through promotional activities and in meeting expectations of the visitor prior to the trip. After a typical long set of steps to plan and book a vacation in Newfoundland and Labrador, visitors arrive expecting an emotionally-rich, engaging, stimulating series of special moments on their journey. Feedback from visitors indicate that they are thrilled with the intimate, emotional charge they feel by the experiences they have with people, places and culture throughout Newfoundland and Labrador. Additional feedback suggests that particular attention needs to be paid to enhancing the sense of arrival and welcome that visitors experience. By focusing operators on efficient wayfinding, friendly service, warm and beautiful surroundings and a strong sense of place, the sense of arrival that visitors feel and their first impressions of the province, communities and operations, will live up to the high emotional expectations that visitors have during their vacations in Newfoundland and Labrador.

Enhance transportation as a key sense of arrival touchpoint

One of the biggest influencers on visitors' first impressions and sense of arrival in a destination is the emotional charge they feel when they immediately arrive and the ease with which they can get to and around the province on their vacation journey. As a result, transportation experiences play a critical role in the overall success of Newfoundland and Labrador as a tourism destination. Ensuring reliable and affordable access to transportation providers, such as airports, rental cars, ferry services, signage and enabling visitors to safely and efficiently find their way around the province are equally important sense of arrival experiences that create the vacation tone to encourage longer stays and increased spending.

A Five-Year Provincial Marine Infrastructure Plan will provide better services at ferry ports across the province. Supported through a \$28 million investment, the plan outlines upgrades and enhancements to ferry terminal areas such as parking, waiting facilities and washrooms, and wharf rehabilitation with the goal of improving the travelling experience for both residents and visitors.

The Five-Year Provincial Roads Plan uses a multi-year approach to build, renew and maintain transportation infrastructure that will greatly improve services for residents, communities, businesses and visitors to the province.

Improve sense of arrival throughout the visitor journey

As outlined in Phase Two of The Way Forward, Realizing Our Potential, attention must be paid to improving the welcome and sense of arrival. Attention must also be paid to improving the welcome and sense of arrival that visitors feel when they reach communities and tourism operations. Establishing a welcome and warm connection and showing the beauty of Newfoundland and Labrador to the visitor immediately upon arrival and on through to their departure is important. It not only provides a better experience for visitors, but also increases individual operators' competitive edge and heightens Newfoundland and Labrador's rare tourism brand.

The Provincial Government will collaborate with tourism operators, municipalities and transportation organizations at major entry points, gateways, hubs and attractions to establish common sense of arrival goals and priorities and initiate partnership activities. This collaboration will include developing market-readiness guidelines that outline best practices for welcome, beautification opportunities, wayfinding, signage and other visitor services.

Actions:

1. Collaborate and initiate partnership activities with tourism operators, municipalities and transportation organizations at major entry points, gateways, hubs and attractions to establish common sense of arrival goals and priorities.
2. Establish sense of arrival market-readiness guidelines that outline best practices for welcome, beautification opportunities, wayfinding, signage and other visitor services for operators, communities, gateways, and engage in strategic sense of arrival investments.
3. Establish partnerships with key transportation providers and partners to focus collaborative efforts on common sense of arrival goals, with particular emphasis on airports, car rental capacity and services, ferry services, wayfinding, road improvements and directional/tourist-oriented signage.



Visitor Services

Enhance visitor services at main provincial entry points and gateways and integrate visitor services throughout the touchpoints along the visitor journey.

Visitor information services are a vital component of the tourism experience supply chain and a priority for all regions of the province. While visitors gather travel information throughout the journey through websites, online engagement and telephone inquiries, visitors also require on-the-ground information validation, deeper trip planning guidance, booking assistance and local knowledge. Visitor services provide a unique touchpoint in the visitor journey to encourage longer stays and engagement in more experiences. One of the primary expectations of visitors is that they will have access to provincially-operated visitor information centres, where travel counsellors provide information and details through face-to-face engagement, maps, guides, brochures and local validation and knowledge. Visitors also seek information and local knowledge through other regional or community visitor information centres and at tourism services and attractions, such as accommodations, restaurants and gas stations.

Enhance visitor services along all touchpoints

Understanding visitor needs will enable the tourism industry to focus efforts in specific ways to enrich the visitor journey. Enhancing the visitor services information provided at visitor information centres and other attractions and services can address persistent gaps along the visitor journey, such as, public washrooms, directions, amenities, health services, etc., as well as heighten the level of promotion of things to experience in regions. Initiatives aimed at equipping all operators to provide the most important visitor services information will equip visitors with the knowledge they need to travel throughout Newfoundland and Labrador with ease and comfort, knowing where they are going and what to expect.

Increase wifi availability and access at primary touchpoints

There are opportunities with mobile and technology solutions for visitor services, specifically for enhancing wifi capacity at key touchpoints for visitors. The Provincial Government developed a standardized identifier for those promoting mobile services to visitors by creating a common logo for public Wi-Fi locations and mapping of public Wi-Fi locations. There are also opportunities to learn responsive visitor services models being used in other jurisdictions, such as mobile visitor services.

Actions:

1. Establish common visitor services information guidelines and collaborate for enhancing the visitor services available along the touchpoints of the visitor journey.
2. Identify priority areas for visitor services information with communications/training focused on providing broader familiarity with local tourism experiences as well as a deeper understanding of the needs and expectations of visitors.
3. Establish and implement sense of arrival, service delivery and market-readiness guidelines for provincially-operated visitor information centres.
4. Establish partnership opportunities to increase access/availability to public washroom facilities at key touchpoints along the visitor journey.
5. Explore responsive visitor services options and identify innovative partnerships.

Food

Increase the number of high quality, local food experiences.

There is an opportunity to improve the visitor experience through enhanced food and beverage offerings. Experiencing the local culinary scene of the province provides a way to connect visitors directly to food stories, traditions and tastes.

Focus on brand food experiences

Food tourism goes well beyond the dining experience. It includes a variety of culinary activities developed expressly for visitors that showcase food and beverages and provide an opportunity for visitors to discover dishes Indigenous to each region. Food and beverage tours, festivals, dinner theatres and other creative ways will help tell food stories. The provincial focus will be on the primary tourism experiences of:

- Tours
- Accommodations
- Festivals and Events
- Retail
- Restaurants

Collaborate to address barriers to food experience development

To enable operators to create and enhance food experiences, there is a need to address persistent challenges within the food tourism sector. There is a need for affordable and efficient access to supply and distribution channels for local food products, especially in rural Newfoundland and Labrador. There are government departments and industry organizations that play a critical role in helping to improve access to local food products. There are unexplored business opportunities, policy requirements, marketing activities and communication linkages among food sector development partners.

Actions:

1. Engage in supporting the development of brand food experiences through network and itinerary development, best practices, promotional programs and marketing partnerships with food and tourism stakeholders.
2. Provide experience development, market-readiness, and other business development support to enable food operators to enhance experiences, especially in areas where visitors and market intelligence have identified gaps in the variety and diversity of food experiences.
3. Collaborate with industry and government food stakeholder organizations to establish provincial food priorities that enable tourism operators to enhance the quality and value of food experiences, with particular emphasis on access to local products and service/quality.

Accommodations

Increase and enhance people and program experiences available at accommodations.

Accommodations in Newfoundland and Labrador are a strategic sector of the tourism industry and have a unique opportunity to impact the experiences on the visitor journey in a way that is innovative and personal.

Focus on building people and program-based experiences

Enhancing the quality and expanding upon the people and program-based experiences in areas with high visitor traffic is an opportunity to increase visitor spending. This will enable a match among accommodations, priority markets and regional attractions that will focus season extension and experience development activities with transportation, visitor services and food, especially in areas along and around:

- Visitor journey routes
- Anchor attractions
- Cluster areas
- Destination trails

Collaborate to address competitiveness

The strategic positioning of accommodators in the tourism industry is being impacted by the shift to more experiential travel expectations and changing visitor booking preferences, particularly with the sharing economy. This requires a matching of accommodation types and quality to fill supply gaps in attraction and accommodation clusters. It will also require efforts to upgrade existing accommodations capacity to meet market demands and growth opportunities.

Actions:

1. Engage brand accommodation experiences in network and itinerary development, best practices, packaging and marketing partnerships.
2. Share provincial and regional capacity opportunities and gaps information to enable private sector investment in strategic locations where demand is demonstrated and investment interest exists.
3. Explore opportunities for creating people and program-based experiences with inns and bed and breakfast accommodations that have local hosts and talents.
4. Explore ways to utilize accommodations as key touchpoints for enhancing sense of arrival, visitor servicing and data collection on visitor profiles.
5. Collaborate with accommodation and government stakeholder organizations to establish provincial actions to enhance the quality and value of their experiences, with particular emphasis on competitiveness challenges within the sector with the sharing economy and unlicensed accommodations.

Natural and Cultural Attractions

Enhance the sustainability and experience development of attractions that are primary travel demand generators.

An anchor attraction is an important force in pulling visitors into the province, regions and communities. Anchor attractions stimulate visitor interest by being either a natural or cultural resource and are often the most emotional experiences that connect visitors to people, place and culture. As a result, anchor attractions are iconic tourism demand generators that greatly impact visitation, spending and satisfaction.

Enhance collaboration with anchor attractions

Newfoundland and Labrador has iconic natural and cultural anchor attractions around which other attractions and services create a cluster for visitor experiences. These anchor attractions, such as UNESCO World Heritage Sites, are operated primarily by federal and provincial government departments and agencies, municipalities, non-profit tourism, arts and heritage organizations. There are opportunities to enhance experiences along the visitor journey through increased collaboration among operators that explores season extension, experience development and packaging.

Strengthen the sustainability of travel demand generating anchor attractions

Non-profit anchor attractions that are travel demand generators must be equipped with the financial and human resource capacity to be sustainable. These attractions, as the foundation of what drives visitor demand, require a commitment to high quality standards of sense of arrival, site design, interpretation and maintenance. They require trained and knowledgeable staff and/or volunteers dedicated to its management.

Create more people and program-based experiences

Anchor attractions reflect the province's most distinguishing characteristics such as views, natural features, culture and heritage and provide opportunities to experience the most extraordinary, attractive features of Newfoundland and Labrador. Effort is required to ensure that natural and cultural attractions are adapting experiences to engaging, immersive people and program-based experiences that visitors are seeking.

Actions:

1. Engage with key industry and government stakeholders to identify travel demand generating attractions and a path towards new financial sustainability opportunities for non-profits.
2. Establish an inventory of existing brand attraction experiences and engage in promotional programs, networks, itinerary development, best practices mentoring, packaging and marketing partnerships.
3. Provide experience development and market-readiness support to enable anchor attractions and other partners along visitor journey routes to enhance experiences, especially in areas where visitors and market intelligence have identified gaps in the variety and diversity of experiences.

Festivals and Events

Enhance the sustainability and experience development of festivals and events.

Festivals and events in Newfoundland and Labrador help grow tourism visitation, with several being travel demand generators with international, national and/or provincial acclaim. The economic impact of festivals and events can be significant, generating business for local tourism attractions, services and experiences. Festivals and events have the potential to impact the whole community and region where they take place. Those that are focused on generating non-resident tourism visitation are offering high quality people and program-based experiences that visitors are seeking.

Identify travel demand generating festivals and events

Newfoundland and Labrador has festivals and events that are travel demand generators, with the ability to increase resident and non-resident tourism visitation. As part of the effort to strengthen the sustainability of primary demand generating festivals and events, they must be equipped with the financial and human resource capacity to be sustainable.

Enhance capacity, experience development and market-readiness of festivals and events

In order to fully leverage festivals and events as tourism demand generators, a proactive festival and event effort is required. Encouraging festival and events with brand potential to engage in experience development, market-readiness initiatives and collaborative partnerships is an important step in creating and delivering new, fresh experiences for visitors.

Actions:

1. As part of the effort to strengthen the sustainability of anchor attractions, engage with key industry and government stakeholders to identify festivals and events that drive provincial and regional travel demand and identify a path towards financial sustainability opportunities.
2. Engage with brand festivals and events networks, itinerary development, best practices, promotional programs, scheduling in peak, shoulder and winter season; and, packaging and marketing partnerships.
3. Provide people and program-based experience development support, market-readiness, and other business development support to enable festivals and events to enhance experiences.

Destination Trails

Increase the market-readiness of cluster trail areas and increase the number of people and program-based experience opportunities on destination trails.

The large variety of hiking and walking trails found in Newfoundland and Labrador are significant, ranging from phenomenal coastal walks that provide access to iceberg and wildlife viewing, to recreational routes through the wilderness, mountains, and communities, and scenic pathways that have been used by locals and visitors for years. With the significant level of existing trail infrastructure, efforts should be focused on clustered networks of trails that offer high quality experiences, reflect market-readiness standards, and increase visitation and spending.

Support cluster-based, destination trail approach

Trail specialists and operators, as well as community, regional and provincial partners, have long recognized the need for prioritization of trail developments. There are often challenges with financial viability and community involvement in the development and maintenance of these capital intensive tourism assets. With an extensive number of trails with varying levels of tourism market-readiness throughout Newfoundland and Labrador, there is a collective desire to better leverage existing priority provincial and regional trail assets and a need to spearhead a cluster-based, destination trail approach for developments that have tourism goals and objectives.

Enhance market-readiness and experience development on destination trails

This cluster-based, destination trails effort encourages the prioritization of trail development on those that have capacity for partnership with, and support from, municipalities and local businesses and attractions throughout the region. Trail clusters can be prioritized for those that have champions who work to produce the community benefits from attracting more visitors and increasing spending associated with trail experiences. Where opportunities for a cluster-based approach exists, the priority is to make enhancements to trail market-readiness and experience development that considers the visitor journey and links communities, trails and services together with other anchor attractions to create holistic appeal.

Actions:

1. Establish destination trail and market-readiness guidelines to support clustered trail development.
2. Engage with key community, industry and government stakeholders to identify priority trail clusters that are destination trails and offer brand experiences that drive provincial and regional travel demand and identify a path towards market-readiness and experience development goals.
3. Engage destination trail experience providers in networks, promotional programs, itinerary development, best practices and information sharing, scheduling, packaging and marketing partnerships.

Craft and Arts

Create and deliver more brand people and program-based experiences through craft and arts.

There is an opportunity to increase the number of people and program-based tourism experiences by engaging local craftspeople and artists into tourism growth opportunities. Focusing experience development goals on craft and arts has the potential to extend the depth and breadth of visitor experiences and increase visitor spending and economic benefit to communities. Newfoundland and Labrador craft and arts stakeholders will benefit from a deeper engagement into tourism market opportunities that can actively engage visitors, deliver authentic, personalized experiences and command a higher price or value proposition.

Create more craft and arts experiences

The number of people in Newfoundland and Labrador with exceptional craft and arts talent provides extensive opportunities to build diverse and differentiated people and program-based experiences that embody the provincial tourism brand of people, place and culture. Craftspeople and artists will be engaged to drive the development of more people and program-based experiences. There are opportunities for bringing craft and arts experience providers into partnerships with existing tourism attractions, activities and operations. There are other opportunities where craftspeople and artists have their own businesses and can package a tourism experience as a new revenue stream. The critical element is developing these experiences to be reflective of visitors' needs, expectations and values through market-readiness guidelines.

Identify talent

Unique craft and arts talent exists in communities and regions throughout Newfoundland and Labrador. These talents are steeped in the creativity of people, place and culture. Identifying potential programs and people (craftspeople, artists, storytellers, musicians, entertainers, writers, guides, etc.) and linking them to existing or underutilized tourism assets and infrastructure will expand the opportunities for operators to create more experiences that will increase visitation and spending.

Actions:

1. Establish partnerships with craft and arts industry to align tourism growth opportunities to increase the number, quality and market-readiness of people and program-based experiences.
2. Engage in craft and arts tourism experience provider networks, with particular emphasis on sharing best practices and experience development, itinerary development, aligned marketing partnerships and packaging.
3. Support efforts of craft and arts retailers and galleries to add people and program-based tourism experiences to their current retail product offerings.
4. Utilize provincial and regional craft and arts networks to identify 'hidden gem' craft and arts talents and link potential experience providers into tourism opportunities and partnerships.



Indigenous Tourism

Increase the number of market-ready Indigenous tourism experiences in Newfoundland and Labrador.

Collaborate to grow market-ready Indigenous tourism experiences

An opportunity to tell the story of people, place and culture exists in the stories of Indigenous people. Indigenous tourism offers opportunities to diversify Newfoundland and Labrador's natural and cultural experiences through unique and memorable Indigenous activities. Through collaborations on product innovations with Federal/Provincial/Territorial committees and through the Atlantic Growth Strategy, there will be opportunities to diversify and improve the market-readiness of Indigenous tourism products and experiences and increase partnerships within the provincial tourism industry.

Actions:

1. Collaborate with Indigenous tourism stakeholder groups and operators to provide experience development mentoring and support, market-readiness, networks, itinerary development, best practices, packaging and marketing partnerships.
2. Collaborate with the Federal/Provincial/Territorial committees to undertake a coordinated, targeted and aligned approach to support Indigenous tourism objectives.
3. Under the Atlantic Growth Strategy, the Provincial Government will work with the Government of Canada and the maritime provinces to support Indigenous tourism product development initiatives.



Shoulder and Winter Seasons

Increase the number of market-ready shoulder season and winter tourism experience offerings.

There is an opportunity to improve the visitor experience through strengthening and promoting the experiences offered in spring, fall and winter. In areas with demonstrated visitor volume growth in spring, fall and winter, stakeholders have an opportunity to collaborate on packaging and partnerships to grow visitation and spending. In recent years, there has been an increase in shoulder season and winter tourism festivals, activities and tours, which has had a positive impact on local economies and season extension. All stakeholders agree that season extension of attractions is a priority to create longer seasons, and generate more volume and revenue. Extending visitation beyond the peak summer season enables private businesses and entrepreneurs to establish a more solid financial outlook for creating new shoulder season experience offerings to encourage longer stays. It also strengthens the profitability and sustainability footing to ensure longevity, viability and growth of all tourism operators.

Collaborate to expand the number of market-ready shoulder season and winter experiences

To increase spring, fall and winter travel visitation and spending, operators and partners will be required to engage in focused collaboration around packaging and season extension efforts and the development of market-ready products and experiences. Collaboration will help enable a greater utilization of the transportation, visitor services, food, accommodations and experiences available in the shoulder and winter seasons.

Actions:

1. Establish partnership initiatives of businesses, organizations and municipalities in regions with demonstrated shoulder and winter season demand that will benefit from an enhanced, coordinated approach to developing season extension goals and increasing the number of market-ready experiences available.
2. Identify multi-regional shoulder season and winter opportunities through partnerships.



2. Enhancing Tourism Market-Readiness



Provincial tourism product development and regional destination development planning revealed variances in the quality, consistency and market-readiness of experiences being developed and delivered in Newfoundland and Labrador.

The focused activities of the Provincial Tourism Product Development Plan and regional Destination Development Plans will equip operators of tourism attractions, services and experiences with the knowledge, tools and supports to create, enhance and deliver high quality tourism experiences.

Enhance tourism market-readiness

There currently exists a wide range of experience development support, market-readiness and business development tools available to operators as they aim to create or enhance the experiences they offer. It is incumbent on all tourism organizations to take proactive steps to increase their ability to deliver to visitor markets by accessing available services and programs. By creating closer relationships among all operators and aligning efforts in specific areas of market-readiness, the tourism industry can gain a better understanding of the gaps and opportunities in the visitor journey that exist. If empowered with focused and targeted experience development and market-readiness guidance, operators can improve their competitive positioning and expand deeper into target markets.

In collaboration with Tourism Board partners, regional committees, task teams and networks, market-readiness and brand experience guidelines will be developed for tourism experiences in the following areas:

- People and Program-Based Experiences
- Sense of Arrival
- Visitor Services
- Food
- Natural and Cultural Attractions
- Festivals and Events
- Destination Trails
- Craft and Arts Experiences
- Tourism Technology Readiness
- Travel Trade Market-Readiness

Actions:

1. Establish tourism market-readiness guidelines and programs to serve as an investment path for tourism operators for creating and delivering brand experiences.
2. Build strong tourism product networks and communication links with key partners in economic development, regional groups, municipalities and sectors to prioritize opportunities reflective of provincial and regional priorities, and that contribute to enhancing market-readiness, experience development, season extension and potential for generating non-resident demand.
3. Establish targets for adoption of market-readiness, quality assurance, technology and innovation enhancements to measure performance.



3. Collaborating to Compete



The key to successful tourism destination development is effectively leveraging private, non-profit and government tourism partners to achieve common, collective goals. All of these partners, communities and regions stand to benefit by collaborating with each other to attract more visitors overall and promote each other to increase spending.

The visitor journey in Newfoundland and Labrador has many touchpoints that require collaborative effort from tourism partners in the Provincial Tourism Product Development Plan. Visitors require a range of things to do and places to go, dine, and sleep. While individual operators may be travel demand generators, it is the collective appeal of the province, region, and communities that will attract visitors and entice them to extend their stay and experience more.

Plan through the visitor journey lens

There is a need to enhance the collaborative and partnership efforts for holistic visitor experiences. Tourism stakeholders must agree on a collective approach to priorities and opportunities based on an understanding of the visitor journey and experience development best practices, which will be achieved through actions to address the gaps and opportunities in services and attractions throughout the regions.

Ensure differentiation, linkages in experience stories

Stories create a strong foundation for moving visitors with like interests on their journey. Businesses and communities can add their unique 'chapter' to the story through the experiences they create. In many cases, this can be done by partnering with existing attractions and organizations to add new activities and programs that connect visitors to the unique and authentic stories, characteristics and culture of local people. It is a way to personalize and differentiate travel options across communities, regions and the province for visitors in ways that generate new tourism spending and provide a sophisticated, consistently high value experience.

Leverage anchor tourism attractions and clusters

There are a significant number of travel demand generators located throughout the province that serve as anchor attractions. However, steps need to be taken to better leverage these attractions and enhance experiences to drive visitation, extend stays and encourage repeat visitation.

Provide experiences when visitors want to travel

It is also critical that the tourism industry is responsive to visitors based on their schedules. For many visitors, exploring Newfoundland and Labrador beyond the traditional peak summer season has tremendous appeal. However, persistent challenges with the capacity of operators to open earlier in the spring and stay open later in the fall are impacting the industry's ability to service the markets that travel in these shoulder seasons. Efforts need to focus energies on identifying solutions to the seasonality of tourism operations. Extending the season will also enable employment opportunities to achieve the growth outlined in The Way Forward and Provincial Tourism Product Development Plan, the tourism industry needs skilled, knowledgeable tourism operators and employees. By offering superior training and business development support opportunities tourism operators can enhance their products and create memorable and differentiated experiences for visitors when they want to travel.

Any region-wide, multi-region or province-wide collaborative plans will drive visitors down a coordinated 'path to purchase' of unique and high quality tourism experiences along their visitor journey in a way that avoids duplication of efforts, resources and inconsistent visitor perceptions.

Actions:

1. Create a strong community, regional and provincial foundation of collaboration between tourism and other sector development growth opportunities and support economic development organizations, tourism organizations, municipalities in aligning efforts to avoid duplication of resources around collective tourism priorities that are vital to developing potential experiences.
2. Facilitate sessions, initiatives and networks that align and help operators, support organizations and municipalities understand the tourism opportunities based on the interests of different visitor types, to create a stronger invitation and sense of arrival. In essence, help the visitor connect-the-dots for opportunities that are aligned with common interests but differentiated product experiences.
3. Collaborate with provincial and regional economic and tourism development organizations to prioritize non-commercial investment and government program/policy development projects that:
 - (a) Have the greatest potential to attract non-resident visitors with strong consideration to those that will drive visitation and spending;
 - (b) Support people and program-based brand experience development, market-readiness and partnership opportunities in core provincial brand experience categories; and
 - (c) Have the ability to offer experiences and drive demand in peak, shoulder and/or winter seasons.

4. Understanding Value and Success



To ensure Newfoundland and Labrador remains a high value and relevant destination in global tourism markets, the tourism industry will always require a commitment to understanding tourism supply and demand intelligence.

Understand visitors

Through collaborative efforts, all partners have to understand who visitors are, how they travel and what they like to experience. While there is extensive existing customer profile and market intelligence available to guide tourism development, there is also a need to prioritize research by forming partnership initiatives aimed at gaining this important information.

Understand value

Understanding the value of experiences and evolving how the collective provincial tourism supply chain responds to evolving visitor expectations is how Newfoundland and Labrador maintains and generates visitor demand. Efforts will focus on enabling a more defined understanding of core travel motivations, marketing considerations, experience appeal and customer profiles.

Share and adapt to market intelligence

Sharing market intelligence broadly with tourism industry operators and partners can serve as a guide to ensure the experiences that operators develop and deliver are both reflective of visitor expectations and profitable. Collaborating for a clear understanding of markets helps industry and government engage in focused business planning and decision-making. Currently, a significant volume of reports, studies and strategies are available that all partners can access to better understand the opportunities and gaps that exist.

Establish performance targets and evaluate success

In order to effectively implement tourism development initiatives, performance targets must be established that realistically identify product development goals and objectives. Regularly monitoring and evaluating tourism performance will enable all partners to adjust actions and initiatives to best achieve goals for increasing visitation and spending. As outlined in *The Way Forward, Realizing Our Potential*, the Provincial Government will continue to conduct market research and regularly provide performance updates and statistics about the tourism industry.

Actions:

1. Communicate non-resident and resident visitor profile information at the provincial and regional level to equip operators to design, price and deliver brand experiences and focus product/marketing investments.
2. Collaborate with Tourism Board partners to prioritize research that can help inform long-term tourism development plans and create research partnerships with key organizations and groups that are leading community or other tourism development plans.
3. Explore outreach tools that assist operators to access and understand available research, introducing online research reports, communiques and webinars that consolidates visitor profiles of resident and non-resident visitors.
4. Continuously monitor, evaluate and identify travel demand generators around which private and public investment, entrepreneurial and experience development opportunities exist and create linkages.
5. Set baseline measures for capturing the metrics associated with advancements in experience development and collaboration (e.g. number of communities involved, number of businesses impacted, number and type of options available to visitors, range of price points from free to high value, etc.).

The Provincial Tourism Product Development Plan lays out specific actions that all tourism stakeholders must take to reach a collective tourism vision. With a focus on partnership and collaboration, the goal to double resident and non-resident visitor spending by 2020 to \$1.6 billion can be achieved, and will grow the economy and support communities.





Alternate formats available upon request.

Tourism, Culture, Industry and Innovation
Government of Newfoundland and Labrador

www.gov.nl.ca/tcii

