



UNCOMMON POTENTIAL: A Vision for Newfoundland and Labrador Tourism

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“The best way to predict the future is to invent it.”
Alan Kay

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FOREWORD

Message from the Premier



As Premier of Newfoundland and Labrador, I am pleased to present *Uncommon Potential – A Vision for Newfoundland and Labrador Tourism*. This is a long-term vision and plan which provides a framework to guide both the Provincial Government and our industry partners as we work together to advance tourism in Newfoundland and Labrador through to 2020.

As residents, we know our province is a special place, unlike any other. Similarly, we recognize that the opportunities and challenges we face are unique to Newfoundland and Labrador. This plan is designed to address the challenges and make the most of our competitive advantage in the global tourism marketplace – the fact that we offer unique travel experiences to visitors interested in taking an exciting adventure off the beaten track.

In Newfoundland and Labrador, surprises wait around every corner and the possibilities are endless — hiking the stunning coastlines, attending festivals celebrating everything from blueberries to squid, experiencing our rich and vibrant culture and heritage, witnessing natural wonders such as whales and icebergs, and meeting strangers who quickly become friends. Living here, it is sometimes easy to lose sight of the fact that these are, indeed, “uncommon” experiences.

This is an industry which has hit its stride and is poised for tremendous growth. We have clearly arrived, and now we are ready to move forward.

This tourism vision challenges and encourages us to come together - as entrepreneurs, industry partners and government - to grow the tourism industry to new heights. We expect this plan will guide the way as we work towards making Newfoundland and Labrador one of the world’s leading travel destinations. I look forward to the years ahead and the outcomes resulting from the implementation of this bold vision for the future.

Danny Williams, Q.C., Premier

FOREWORD

Message from the Chair of Hospitality Newfoundland and Labrador



As Chair of the tourism industry association, Hospitality Newfoundland and Labrador, I am delighted with what we have achieved in the development of *Uncommon Potential – A Vision for Newfoundland and Labrador Tourism*.

As a collaborative effort between the Provincial Government and the tourism industry, the Vision was drafted as a long-term plan to double tourism revenue by 2020. This will be no small feat; however, the framework included in the Vision will provide guidance to Government and our industry partners to ensure success.

Newfoundland and Labrador is in an enviable position among national and international destinations. Our people and our place, together, breed a culture so thick that it engulfs us and our travellers. Our natural and cultured character combined with a long history of strength and bravery plus a formidable creative streak make Newfoundland and Labrador a traveller's paradise. As tourism operators, it is our responsibility to learn from our environment and from each other to realize the opportunities that lie within our surroundings. With forward thinking, we all have the ability to offer travel experiences that are unique and uncommon.

The tourism industry in Newfoundland and Labrador is still youthful and has huge growth potential but there is work to be done. To achieve what is outlined in the Vision, it will be necessary for government and industry to work closer than ever before towards a common goal. Through the visioning process, government, industry, and all stakeholders have developed the foundation for a formal partnership. By following this unified course of action, we can address the issues directly and implement strategies for success.

As an industry, we are committed to being a part of the solution for the greater good of the tourism industry and Newfoundland and Labrador. We are ready to take the next steps. I look forward to collaborating with all of you to make this Vision a reality.

Bruce Sparkes, HNL Chair

INTRODUCTION

A Bold Vision for the Future

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

Tourism is one of Newfoundland and Labrador’s greatest economic drivers. From 2003-2007, non-resident visitation increased by 15%, and generated approximately \$357 million (2007) in annual provincial revenue.

As a whole, the industry contributes almost \$790 million (2007) to our economy each year, supports 12,730 direct jobs in tourism, and generates significant economic and cultural spinoff.

Beyond the economic benefits, tourism helps preserve and protect our natural heritage, culture, and history. And it gives life to a range of facilities and events that play an important role in the regeneration of communities for both residents and tourists alike.

It’s also an industry with huge untapped potential.

The Newfoundland and Labrador Tourism Vision 2020 (Vision 2020) provides a blueprint for extraordinary growth. It addresses the real and perceptual barriers facing our industry with innovative strategies and actions. And it challenges us to come together as entrepreneurs, industry partners, and Government to grow our industry to new heights: to double the annual tourism revenue in Newfoundland and Labrador by 2020.

Background: The Tourism Vision Planning Process

Vision 2020 is the result of considerable research, analysis, and consultation including:

Government and Industry Leadership. The vision was developed under the guidance of the Vision Steering Committee with representatives of the Department of Tourism, Culture and Recreation, and the tourism industry association, Hospitality Newfoundland and Labrador (HNL).

Consultant Expertise. An independent team of consultants reviewed external tourism initiatives to ensure our vision was guided by market trends, competitive experience offerings, and best practices.

Industry Consultation. Province-wide consultation workshops and individual meetings were held with industry participants, tourism-related industry organizations, and government representatives to identify priority issues and opportunities. The findings culminated in the foundation for 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. It is a product of the consultation process and was prepared under the guidance of the Vision Steering Committee.

RENEWED DIRECTION: 10-YEAR VISION FOR TOURISM

“Vision is the art of seeing what is invisible to others.”
- Jonathan Swift

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 revenue in Newfoundland and Labrador by 2020.

Increase the value of tourism to our visitors, our residents, our businesses, our communities, and our environment around the seven strategic directions identified through the research and consultation process. The strategic directions are the foundation of the strategy and action plan to be developed and implemented.

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 will guide us throughout our 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.

PLANNING CONTEXT

Tourism in Newfoundland and Labrador: The Economy & Future Growth

Tourism is the fastest growing economic sector in the world, leading the way in foreign exchange earnings and job creation. It's also the world's largest export earner.

In Newfoundland and Labrador, tourism is also a vital industry. It is a large and growing sector that is an important source of employment for our province, and a crucial part of our future economic prosperity.

Undoubtedly, Newfoundland and Labrador is in an enviable position. Our natural, yet surprisingly, exotic destination offers unique, compelling experiences that are differentiated from traditional travel destinations. Our rugged landscape comes with 20,000 miles of dramatic coastline, infused with rich icons of whales, icebergs, and wildlife. It's a place steeped in creativity with a vibrant spirit, engaging culture, and an ancient history. A place where you can, at the same time, lose yourself and find yourself.

But in an increasingly competitive global marketplace, there is no room for complacency. We must strive to be the best by offering a diversity of unique, high-quality experiences that appeal to our visitors' sense of a personal and rewarding journey. We must also continue to support, develop, and invest in our tourism industry so we can meet new and future challenges and opportunities.

Tourism has many advantages for Newfoundland and Labrador:

Tourism brings a significant injection of new money into Newfoundland and Labrador. In 2007, an estimated 490,100 non-resident visitors contributed approximately \$357 million to our economy. And non-resident visitation has increased by 15% since 2003.

The resident market is also a substantial component of our tourism industry, representing over 55% of total tourism spending in the province (2007). This market continues to play a major role in sustaining tourism business outside of peak season.

Tourism is a key driver of meaningful jobs, creating over 12,730 sector-related jobs annually. It fuels provincial economic growth, builds regional pride, and creates employment opportunities that encourage both urban and rural renewal. It helps drive investment in leisure, recreation, and cultural facilities that benefit both residents and visitors. And it supports 2,400 small businesses that contribute to our economy and generates tax revenue to help financially support vital services such as health care and education.

Market Context: Emerging Global Trends

“It is not the strongest of the species that survives, nor the most intelligent that survives.
It is the one that is the most adaptable to change.”
- Charles Darwin

Though Newfoundland and Labrador is one of the most unique and compelling tourism destinations in the world, we are not immune to changes in the marketplace. Our future success depends on our ability to anticipate and adapt to global trends and market changes.

Existing and emerging destinations are competing vigorously to offer a range of diverse experiences and activities to an increasingly sophisticated traveller. Tomorrow’s travellers will demand higher levels of control, comfort, security, and personalization from their travel experiences. In the face of increased global competition, winning the hearts and minds of travellers has never been so critical.

Strong economic conditions and personal disposal income will remain major tourism drivers. Economic volatility is the biggest influencer of travel demand as it translates into changes in consumers’ discretionary spending patterns.

Ongoing price fluctuations in fuel and exchange rates will also impact vacation travel decisions. Exchange rates, in particular, can impact total visitation as well as how much visitors spend during travel.

To sustain 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. Information technology advances have revolutionized the way people research and book their travel. Today, over 80% of travellers conduct general trip planning and travel research online. The growth of the internet has also exponentially compounded the options, conveniences, and bargains available to travellers.

Quality Service. The tourist marketing battle is shifting from competitive pricing to a growing demand for service quality. The more people travel, the more they expect higher levels of service. The demand for quality, value, and authentic experience has never been greater.

Environmental Consciousness. Climate change has emerged as a significant environmental concern and travellers are becoming more conscientious of their footprint. There is also an increased demand for sustainable approaches to preserve the natural and cultural heritage of a destination.

Safety and Security. There is a growing demand for safe and secure vacation experiences that are free from natural disasters, civil unrest, and terrorist threats. More than ever, travellers are looking for a peaceful 'haven' where personal safety is not a concern.

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 Changing 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. It's also led to increased consumer interest in exploring new, 'off the beaten path' places, and to trends such as intergenerational travel groups.

Experience Travel. Travel is driven by a deep emotional motivation to experience new people, cultures, and places, and perhaps to discover something within ourselves along the way. There is a growing demand for unique, high-quality experiences, even at a premium price, as well as cultural and nature-based activities.

Individualism. More and more, travellers are seeking customized, engaging, and original experiences that have a sense of unpredictability and authenticity. Natural and exotic destinations are the alternative choice to the prepackaged, and often times 'plastic' tourist destinations.

Redefined Holidays. People are looking for ways to enjoy quality time with friends and family in trips that are easily planned, shorter, and more frequent than the traditional once a year, two-week vacation. There is also a growing traveller appetite for sabbatical vacations or a trip of a lifetime.

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

Developed carefully, tourism can be a sustainable industry with far-reaching economic, social, and cultural benefits. It has the ability to further generate substantial economic returns long after non-renewable resources have been extracted from our province.

Our industry also has a vital role to play in addressing the challenges of urbanization. Rural communities are the heart and soul of our province, and the foundation of our travel experiences. By investing in our tourism industry, we are investing in rural Newfoundland and Labrador, and keeping our communities alive and vibrant.

There are many opportunities to consider and challenges to overcome on our journey to doubling our industry potential and revenue by 2020. They include:

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's 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. Our challenges do not end there. A short peak season, capacity constraints during peak season, infrastructure and facility deficiencies, and underdeveloped tourism 'products' and experiences make a tough job even more difficult.

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 significant impediments to the growth of our industry. While we cannot control the business decisions relating to access, we can help identify and implement solutions based upon a collaborative business-case approach that is relevant for transportation partners and the tourism industry.

Slowed Growth. While our tourism industry grew by 15% since 2003, this growth has now slowed. Global economic trends, an increasingly competitive landscape, and shifting consumer demographics and demands have all impacted our growth.

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

Marketing Our Brand. The 'Find Yourself Here' marketing and advertising campaign has put Newfoundland and Labrador higher than ever on travellers' radar as being a distinctive destination. And it's created exceptional, valuable 'buzz' among our biggest opportunity groups.

As a result, Newfoundland and Labrador has been named one of the top 'new' and 'undiscovered' travel destinations on several key travel lists from industry leaders like Lonely Planet and Fodor's.

Our distinct brand positioning and personality, and the creative strategy and execution that romances, reflects, and expresses it, has captured the hearts and minds of travellers, and strongly differentiated our province from competing destinations.

The campaign lures travellers by expressing our natural creativity, and the uncomplicated and somewhat spiritual feeling you get when you're in Newfoundland and Labrador. And it evokes a rich emotional response and desire to visit this naturally exotic and unexpectedly different place.

In an expanding global marketplace, however, the challenge to maintain growth and increase market share is unrelenting. As competitors commit significant resources to enhance their marketing capability, the battle intensifies for share-of-voice in an over-communicated world.

Our Target. Continued success requires investment in our rich, emotional, and highly differentiated brand image that speaks to our target audience. Our biggest opportunity group don't see themselves as 'tourists', but as increasingly sophisticated and experienced 'travellers' seeking more unusual places and experiences 'off the beaten track'.

Development. Along with consistent brand differentiation, developing our existing tourism resources creates even further opportunity for growth within our industry. These valuable resources include:

- ▶ Highly skilled, dynamic, and professional workforce to meet the growing demand for the delivery of quality services, products, and experiences.
- ▶ World-class infrastructure to deliver on our brand promise, allowing for a quality travel experience, and stimulating travel throughout the province.
- ▶ Easily accessible products and experiences that reflect our unique natural and cultural heritage and resonates with travellers.
- ▶ Advances in technology and communications infrastructure to improve all stages of online visitor engagement.
- ▶ A broad platform to attract travellers beyond the overall destination and into our regions, communities, and places of business.

Investment. Now, more than ever, strategic investment is required to meet travellers' demands for rich emotional experiences that deliver on our 'creativity' brand promise.

Partnerships that align and focus both government and tourism industry investment decisions are essential.

We must invest in increasing operator use of web and online booking technology to keep pace with the technology advancements demanded by the market. Increased use of technology will also enable access to information and resources – important operator assets.

We must also invest in elevating the image of the tourism industry. There is growing pride in our unique culture, heritage, and our natural beauty, which tourism helps preserve and protect. We need to take advantage of the opportunities to deepen citizen and community engagement and ownership of the value of tourism. We need to showcase tourism as a vibrant and sustainable industry with dynamic employment opportunities for our people.

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

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 over the next decade.

It also outlines the seven strategic directions that indicate the kind of future we want to build for Newfoundland and Labrador. And the increased economic value we want to achieve.

Success depends on our entire tourism industry, both public and private sector, taking responsibility for achieving our target. One organization, agency, community, or entrepreneur is not enough. We need to work together, with the support of Government, to travel in the same direction and to achieve success in all areas of the vision.

To deliver on the ambitious target that the Newfoundland and Labrador tourism industry has set for itself, the seven strategic directions are:

Strategic Direction 1: Private Public Leadership – A Partnership for Tourism Growth & Development

Strategic Direction 2: Sustainable Transport Network – A Transportation Strategy to Grow Our Industry

Strategic Direction 3: Market Intelligence & Research Strategy – A Framework for Accessible & Timely Research

Strategic Direction 4: Product Development – Delivering Strategic & Sustainable Traveller Experiences

Strategic Direction 5: Tourism Technology – Strengthening Our Information & Communications Technology

Strategic Direction 6: Marketing Our Brand – Building on the Success of Our Creative Marketing Campaign

Strategic Direction 7: Developing Our Workforce – Growing Our People for a Dynamic Industry

These strategic directions are intended to guide an investment plan for tourism and provide the platform for a shared focus and unified action. Ongoing and widespread communication among all industry stakeholders will be a critical success factor that underpins all seven strategic directions.

In response to the global market trends and the unique challenges we face, we are confident these strategic directions will lead us to our ultimate goal of doubling our tourism value by 2020, even as changes occur around us. Vision 2020 will be regularly monitored and, where necessary, specific goals and actions will be modified to meet changing external conditions.

Our vision for 2020 is exciting yet challenging. But doubling the annual revenue of our Tourism industry is well within our capability.

There's never been a better time to invent the future of tourism in Newfoundland and Labrador.

STRATEGIC DIRECTION 1: PRIVATE PUBLIC LEADERSHIP

A Partnership for Tourism Growth & Development

Realizing our vision for a prosperous tourism industry, one that will see the value of the sector doubled by 2020, requires a significant shift in thinking, and a transformation in the way government and industry work together.

Our common goal is a sustainable tourism sector that taps into our growth potential and delivers maximum economic, social, and cultural value. Government, public agencies, industry, and communities need to work collectively towards it. Significant linkages between us all will be vital to our future success.

With an aggressive target identified, our strategy affirms the need for partnership working on an unprecedented level. A shared leadership between government and industry is crucial to ensure participation and reinforcement of industry engagement in the delivery of the strategy's action plan.

In the current landscape, there is no one entity that is ultimately responsible and accountable for leading the growth and development of a highly interdependent tourism industry. Tourism's current structure is neither adaptable nor responsive. Further, it is highly fragmented.

While there are positive relationships among government, industry, and non-profit organizations to build upon, there is a strong need to better organize and focus our efforts.

All government departments and agencies with tourism-related mandates need to strategically align and integrate. And government needs more industry stakeholder input to ensure a strategic focus towards our shared goal.

In addition, regional tourism organizations such as destination marketing organizations and non-profit tourism experience providers, need to have well-defined roles, responsibilities, and financial support structures. And leadership throughout the industry needs to be strengthened with further training and development.

Through the visioning process, government, industry, and all stakeholders have developed the foundation for a formal partnership. Our new Tourism Board will champion the implementation of our vision and lead the way to 2020.

The Board's immediate key priorities will be to:

- ▶ Define and drive tourism investment and development decisions focused on the research, marketing, product development, and visitor experience priorities of Vision 2020.
- ▶ Align government and industry efforts by building strong linkages throughout the provincial and federal governments; 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 Board will be a true private public partnership comprised of government and industry leaders and will evolve into the leading organization for tourism in Newfoundland and Labrador.

Initially, the new Tourism Board will be comprised of:

- 4 tourism industry leaders.
- 4 Destination Marketing Organizations leaders.
- 4 senior government leaders.

The Board will have access to additional expertise as needed to achieve our vision and strategy, and will be supported by an industry secretariat to perform policy, administrative, and communication functions.

It is critical that the leaders of the new Board have the skills and abilities necessary to carry out their mandate. Members will be senior leaders within their own business, department or organization, and recognized leaders within our industry. They will have a solid understanding of the challenges and opportunities of our industry, and a commitment to the priorities 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	Establish a Private Public Tourism Board (Timing: Within 3 months)
Actions:	
▶	Define and communicate stakeholder roles and ensure support is provided for these roles. (Timing: Q2, 2009)
▶	Develop and prioritize a 3- to 5-year Tourism investment plan. (Timing: Q3, 2009)
▶	Commit the necessary resources to enable the Board to accomplish the challenges and tasks that will be required over the next decade to ensure growth. (Timing: Commencing Q1, 2009)
▶	Ensure the appropriate tracking and accountability mechanisms are in place to monitor and measure success of implementing Vision 2020. (Timing: Commencing Q1, 2009)
Goal 1.2	Strengthen Stakeholder Communication
Actions:	
▶	Establish a formal, quarterly interdepartmental meeting between government departments with an active role in tourism. (Timing: Q1, 2009)
▶	Use available communication tools and avenues to communicate the vision and strategy, engage stakeholders, and increase the effectiveness of coordination between all tiers of government and tourism stakeholders. (Timing: Q2, 2009)
Goal 1.3	Lead through Best Practices
Actions:	
▶	Identify and support best practices for leadership learning and development. (Timing: Q3, 2009)
▶	Continue to increase the benefits of education and training through an active partnership with the education and training sector. Develop closer links between businesses, training providers, and educational institutions for future opportunities. (Timing: Q3, 2009)
▶	Identify and cultivate new industry leaders through known succession planning best practices. (Timing: Ongoing)

STRATEGIC DIRECTION 2: SUSTAINABLE TRANSPORT 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.

The transportation issues facing tourism in Newfoundland and Labrador are well understood and frequently articulated among industry stakeholders. In short, travel to, from, and around the province, whether by sea, air, or road is 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. There is an immediate requirement for improved, affordable, and efficient access to and within the province. It's the most critical element to stimulate inbound tourism. And it will have considerable influence on our industry over the next decade.

Access by Air. Air passenger travel accounts for approximately two-thirds of non-resident visits each year. Our response to strategic transport challenges identified in the Government of Newfoundland and Labrador's 'Air Access Strategy' and through other forums is vital to the future success of our industry.

Access by Land & Sea. Visitors arriving to Newfoundland and Labrador by sea and road form an important part of our industry. Representing almost 27% of all inbound travellers, they stay longer (13.6 nights versus 9.3 nights), and they spread the benefits of tourism to our rural communities and regions. Maintaining growth in the drive travel market requires a significant, coordinated effort from all sectors of government and the industry to support the strategic development of our ferry services.

Along with non-resident auto travel, cruise visitation is also an important economic generator; 2007 was a record year with 55,500 cruise passengers and crew visiting various ports. To maintain cruise growth, we need to manage cruise travel challenges relating to port market readiness and Customs services and regulations.

In-Province Infrastructure. Well-developed and efficient in-province transportation infrastructure must also complement overall ease of access to the destination. This includes well-maintained roads, adequate road and directional signage, public transport, and other infrastructure to meet the needs of travellers. It will help the industry maximize the value of non-resident (and resident) visitors by making it easier for them to explore the province more widely, and spend more during their travels. From a strategic perspective, and to fulfill our economic potential, it is essential that we develop and improve transport infrastructure to a standard that can sustain existing visitor needs and support future growth.

The Way Forward: Priorities & Actions for Improved Transportation

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

<p>Goal 2.1 Build strong relationships with key transportation alliances that provide access to and from our province to meet the demand for affordable, accessible, and quality transportation</p>
<p>Actions:</p>
<ul style="list-style-type: none"> ▶ Work in partnership with government and key industry stakeholders to implement 'Air Access Strategy' recommendations with the aim to improve service, and build frequency and capacity to Newfoundland and Labrador.
<ul style="list-style-type: none"> ▶ Advocate for federal funds to enable Marine Atlantic ferry services to make significant improvements towards affordable, efficient, and higher quality access.
<ul style="list-style-type: none"> ▶ Work with government to make the internal ferry system a pleasurable experience for all users.
<ul style="list-style-type: none"> ▶ Continue to work in partnership with key transportation partners to implement cooperative marketing programs for air and ferry access.
<p>Goal 2.2 Ensure efficient and easy travel in, and around, the province</p>
<p>Actions:</p>
<ul style="list-style-type: none"> ▶ Improve general directional signage and implement tourist-oriented directional signage (TODS).
<ul style="list-style-type: none"> ▶ Ensure way-finding technology, such as Global Positioning Systems (GPS) is utilized.
<ul style="list-style-type: none"> ▶ Address the issue of car rental capacity and limited ground transportation services.

STRATEGIC DIRECTION 3: MARKET INTELLIGENCE & RESEARCH STRATEGY

A Framework for Accessible & Timely Research

The tourism industry is a fast-changing, dynamic market. Sound knowledge and insightful research are necessary to maintain competitive advantage and drive innovation.

For both government and the private sector, awareness of market trends as well as emerging opportunities and challenges is critical for future planning and growth.

The Department of Tourism, Culture and Recreation has an ongoing approach to conducting tourism-based research; specifically, tourism indicators, market opportunities, tourism issues, legislation, and policies and programs. The Department also maintains an active travel/tourism database for various marketing, customer relationship, and research purposes. However, a framework for obtaining and disseminating valuable market intelligence, and creating high quality, accessible, and timely marketing research for the benefit of all industry stakeholders is essential.

Timely, quality research is a fundamental tool for all tourism partners to help shape strategic decisions and achieve business objectives. A consistent research strategy and coordinated approach to information sharing is essential among stakeholders. It provides a beneficial forum to investigate broader tourism issues, and share information about current trends, new market opportunities, and changing traveller profiles.

Research also enables the tourism industry to make informed investment decisions regarding product and experience development, and market placement. And it's a significant component of monitoring the success of investment decisions – a key requirement of Vision 2020.

As an industry, we must take advantage of opportunities to share research findings, optimize existing research, and establish new relationships to gain additional market intelligence. To capitalize on these opportunities a research agenda must be created, partnerships must be formed, and stakeholders must have access to timely and relevant information.

The Way Forward: Priorities & Actions for a Market Research Framework

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

Goal 3.1	Develop and implement a research strategy and plan that provides industry and government with relevant and timely information and analysis
Actions:	
▶	Identify and prioritize research to drive strategic directions regarding market trends and opportunities, changing traveller profiles, and consumer behaviours.
▶	Enhance research capabilities through the development of research partnership with academic institutions and other traditional and non-traditional partners.
▶	Ensure high-quality research is readily available to further aid strategic industry decision making through data mining of existing research and ongoing analysis of web metrics.
▶	Communicate research findings in a timely manner to support sound business decisions.
Goal 3.2	Establish performance indicators to annually measure the success of Vision 2020
Actions:	
▶	Establish a set of performance indicators and measures to track performance on an annual basis.
▶	Annually report performance to stakeholders and the public.

STRATEGIC DIRECTION 4: PRODUCT DEVELOPMENT

Delivering Strategic & Sustainable Traveller Experiences

Newfoundland and Labrador has continued to strengthen its position in the national and international tourism marketplace. Our unique natural attractions, our distinct cultural heritage, and the colourful character of our people are tremendous assets for our industry, enabling us to capitalize on emerging travel trends, and build upon them for future growth.

As travellers become more discerning about their ability to get involved in, experiment, and explore authentic and unique destinations, they are looking for experiences that can be customized to meet their specific needs. Newfoundland and Labrador is an exotic, largely unspoiled destination. As such, it is well-positioned to respond to the growing interest of travellers in products and experiences that evolve from a unique culture and heritage, and outdoor activities supported by a rugged, natural landscape.

However, on the road to successful product development, we must address the following challenges:

- ▶ Ensuring a critical mass of authentic attractions and experiences with supporting infrastructure and service in the right locations, to respond to market demands and expectations.
- ▶ Developing multi-season tourism demand to help achieve sustainable, viable tourism products. And mitigate unrealistic expectations that many of our demand-generating attractions can be financially self-sustaining.
- ▶ Balancing people's desire to travel with the need to protect our natural environment in the face of climate change.

These challenges also provide opportunities for Newfoundland and Labrador to develop a consistent and high-quality traveller experience through product development, infrastructure, and environmental sustainability.

Traveller Experiences

Sophisticated travellers expect vacation experiences that tell the true story of the destination. Experiences that let you emotionally connect to a place, and at the same time, make a self-discovery. Our 'Find Yourself Here' campaign reflects this through the advertising's strong and deliberate 'experiential' focus.

Through careful and strategic development of experiences that are true to our distinctive natural and cultural character, we ensure our sustainability as a tourism destination.

Product Development

The 2004 Product Development Strategy remains a relevant guide to Newfoundland and Labrador’s product and infrastructure priorities. However, increased focus is also required on the products, experiences, and infrastructure that generate return-on-investment and enhance our social and environmental values. Roles and responsibilities to address current product and infrastructure gaps also need to be identified.

Infrastructure

Our visitors expect good roads, public transport networks and facilities such as rest stops, rental cars, parking, clear signage, and easy access to information. Investment in high-quality infrastructure that enables the tourism industry to meet and exceed visitor expectations must continue.

Working collaboratively, we must focus on the products, experiences, and infrastructure that enhance economic return, and preserve our natural and cultural assets for future generations.

The Way Forward: Priorities & Actions for Product & Experience Development

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

Goal 4.1	Develop and implement an experience strategy that resonates with sophisticated travellers, reinforces our unique brand, and increases our return-on-investment
Actions:	
▶	Utilize research and best practices to develop experiences and products that match the emerging demands of the marketplace. Our traveller experiences must reinforce and sustain our natural and cultural assets, and appeal to visitors seeking a premium experience with a point of difference, rather than the conventional or mainstream.
▶	Identify key travel generators for sustainable development and investment.
▶	Continue to leverage the 2004 Product Development Strategy as a guide to maintaining and improving the products that meet the needs of our key target audience and generate travel.
▶	Continue to facilitate product development, specifically, market-driven products that are sustainable, innovative, rooted in our unique sense of place, and reflective of our rich arts, culture, and heritage.
Goal 4.2	Continue to improve government-owned tourism infrastructure
Actions:	
▶	Enhance existing tourism infrastructure such as interpretive sites and directional signage.
▶	Assess and plan for the impact of the Trans-Labrador Highway.
▶	Work with the federal and provincial government to identify and address infrastructure gaps such as enhanced communications technology.
Goal 4.3	Be a visible leader of environmental sustainability
Actions:	
▶	Adopt an environmental code of conduct to guide all elements of tourism development.
▶	Work with the tourism sector to ensure businesses have the capability and knowledge to take an active role in protecting and enhancing the environment.
▶	Implement an awareness, education, and incentive program that supports environmental sustainability.
▶	Attract travellers who share our values of respecting our social, cultural, environmental surroundings.

STRATEGIC DIRECTION 5: TOURISM TECHNOLOGY

Strengthening Our Information & Communications Technology

A widespread, modern information and communications infrastructure is fundamental to our competitive advantage and our economic success as a leading tourism destination.

Already, advances in technology have revolutionized our industry, and changed the way travellers research and book their travel. Over the next decade, we'll undoubtedly see even further advances. Positioning Newfoundland and Labrador for growth requires a digital strategy that ensures we have the technology and infrastructure in place to do business and engage travellers at all stages of planning and travel.

The emergence of the sophisticated digital consumer in the global tourism industry reinforces the importance of technological infrastructure within our province's tourism industry.

Today's travellers expect easy access to information, online booking functionality, and instant access to information. Technological infrastructure is vital at all stages of visitor engagement. Online tools and technologies that illustrate the consumer experience and help travellers plan and book trips have already had a significant impact on destination selection.

To keep pace with these changing traveller behaviours, our entire industry must embrace current online tourism marketing strategies by using the internet to provide travel information, manage customer relations, and process travel bookings.

Our extensive Visitor Information Centre network, based upon a traditional information distribution model, offers limited internet capability outside of main gateway centres. New ways of providing visitor information must be engineered to offer on-demand and interactive information.

Despite federal and provincial government intentions to provide broadband access throughout the province, significant gaps in access to technology and the ability to leverage online technology remain. Tourism businesses in all geographic areas of the province need access to broadband service to provide quality websites, digital information, and online booking services – key marketing tools to engage potential travellers.

Connectivity within the industry is essential. Without it, our tourism sector cannot remain competitive in the rapidly changing online environment or offer visitors a world-class experience. Increasing technology infrastructure and access will enable effective linkages between all stakeholders.

The Way Forward: Priorities & Actions for Tourism Technology Infrastructure

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

Goal 5.1	Ensure all tourism partners and operators embrace technology as critical elements in attracting visitors and enhancing their experiences and services
Actions:	
▶	Support operators to be market-ready with online technology and digital marketing tools including quality websites, digital information such as online brochures, and online booking services.
▶	Advocate provincially and federally for province-wide availability of broadband internet service.
▶	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.

STRATEGIC DIRECTION 6: MARKETING OUR BRAND

Building on the Success of Our Creative Marketing Campaign

Newfoundland and Labrador's 'Find Yourself Here' campaign has been hugely successful in positioning the province as a unique and exotic destination. The campaign has won many regional, national, and international marketing awards, and has earned the distinction of being one of the most unique destination marketing campaigns in the country.

In 2007, our marketing campaign won the Tourism Industry Association of Canada's (TIAC) Marketing Campaign of the Year Award, an award that recognizes our creativity and commitment to excellence in marketing. It also led to the Marketer of the Year Award at the Atlantic Canadian ICE awards, an advertising awards competition that honours innovation, creativity, and enterprise. And, Newfoundland and Labrador was also named a 'Top 30' travel destination for 2008 by Lonely Planet, one of the world's most respected travel guidebook publishers.

This heightened level of interest in our destination and our marketing efforts is a result of our national award-winning marketing campaign, our increased efforts to showcase our province to the international travel media, and the fact that our industry is providing travel experiences that are in high demand.

The campaign has a clear target 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 ad campaign showcases who we really are – a natural, yet surprisingly, exotic destination that goes beyond the packaged, 'plastic' kind of tourism other destinations offer. 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. To achieve this, we must first strive for a further understanding of travellers' needs and wants, and their destination decision-making criteria.

As an industry, we must have the courage to challenge conventional wisdom to ensure we are meeting market needs, and are open to new, innovative and non-traditional forms of marketing. We must focus our resources on the target audiences and markets that offer the best opportunity for a high return-on-investment.

Tourism operators have a lot to offer travellers, but on an individual level it can be challenging to generate adequate exposure. The answer lies in forming cooperative marketing partnerships to build stronger, coordinated campaigns using the combined resources of the province and the industry. Leveraging our collective time and resources to market the destination will result in increased spending, tax dollars, jobs, and investment throughout the province.

Equipping our tourism industry and individual operators with the necessary brand tools and marketing support will help reinforce the brand at all levels of visitor engagement, and translate into a consistent experience that meets 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. And it will increase our recognition among our key target audiences looking for an antidote to the predictable and the plastic.

The Way Forward: Priorities & Actions to Build Our Brand

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

Goal 6.1	Continue to build a successful, differentiated tourism brand and leading tourism marketing position
Actions:	
▶	Exploit non-traditional partnerships to continue to appeal to new, emerging traveller demands and market opportunities.
▶	Ensure resources are continually invested to build on market opportunities and to tap into new 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:	
▶	Develop a multi-year strategic marketing plan that will complement the overarching tourism strategy.
▶	Monitor the evolution of new marketing tools and technology advances to ensure Newfoundland and Labrador remains a leading destination.
Goal 6.3	Ensure there is a clear understanding of the roles and responsibilities of all stakeholders in promoting the province as a destination
Actions:	
▶	Continue to work towards marketing best practices and deliver on the 'creativity' brand positioning in advertising executions and marketing communications.
▶	Provide advice and marketing templates that are easy for operators to use and implement, including a tourism brand guide and toolkits.
▶	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.
▶	Work with Destination Marketing Organizations (DMOs) to streamline marketing that minimizes duplication of effort, and maximizes our collective brand voice and impact.

STRATEGIC DIRECTION 7: DEVELOPING OUR WORKFORCE

Growing Our People for a Dynamic Industry

Tourism is a highly labour-intensive, service-based industry. And people are our major asset — our industry currently supports 12,730 direct jobs in Newfoundland and Labrador.

To achieve the growth outlined in Vision 2020, and to meet the evolving needs of travellers, our sector needs skilled, knowledgeable staff and superior training. Our people and communities must understand the importance of tourism to the province's economic and social well-being, and the importance of their own roles in building our unique brand of service.

At the same time, our industry must deal with the province's tight labour market, making it difficult for operators to attract, retain, and train good people. This situation is expected to escalate with continued industry growth, and a shrinking replacement pool due to a declining birth rate and a retiring generation of baby boomers, as well as out-migration to other jurisdictions with higher wages.

The demand for skilled workers means that tourism employers not only compete with each other but also with employers from other industries and places. Therefore, we must work together to find solutions for this new labour-market landscape. As an industry, we cannot achieve our goals without a skilled and capable workforce.

But we are not without strengths.

There is growing appreciation of the role and value of tourism among individuals and communities. We are known for our friendliness. And our natural warmth, hospitality, and character contribute to the memorable and differentiated experiences of our travellers. A visit here is a chance to meet our authentic, friendly people, experience our unique culture and heritage, and interact with our remarkable landscape.

We are working to further elevate the image of tourism, to instill a sense of pride, and to attract the right people for long-term tourism career opportunities. Training and development also has a critical role to play in the growth and success of our industry.

The Way Forward: Priorities & Actions to Attract, Retain & Develop Our Workforce

To attract, train, and develop a skilled, sizable tourism workforce, the following priorities and actions have been identified:

<p>Goal 7.1 Instill a sense of pride, encourage a spirit of hospitality, and foster a positive relationship between our industry and the communities who will help us achieve Vision 2020</p>
<p>Actions:</p>
<ul style="list-style-type: none"> ▶ Develop a marketing campaign that demonstrates the economic and social value of tourism, and instills pride in our people.
<ul style="list-style-type: none"> ▶ Leverage existing communication channels and publicity to highlight the good news stories and successes of our industry.
<p>Goal 7:2 Focus efforts on attracting and retaining a skilled tourism workforce</p>
<p>Actions:</p>
<ul style="list-style-type: none"> ▶ Promote tourism as an exciting and dynamic industry, and a viable career opportunity with flexible working hours, part-time options, and regional employment opportunities.
<ul style="list-style-type: none"> ▶ Encourage tourism operators to increase focus on education, training and development to ensure our people have the technical skills, customer-service skills, storytelling and interpretation skills to deliver on our 'creativity' brand experience.
<ul style="list-style-type: none"> ▶ Continue to actively work with, and demand excellence from, the tourism education and training sector; seek out flexible training solutions between businesses, educational institutions, and other industry training organizations.

THE JOURNEY BEGINS

The growth of the tourism industry is vital to the economic well-being of Newfoundland and Labrador. The strength of our industry is based on renewable resources – our land, our culture, and our people. Managed correctly, tourism can flourish, preserve, and sustain our culturally-rich urban and rural communities throughout our province.

Our award-winning tourism marketing campaign has helped us create an image of the province that is creative, innovative, and a must-see destination. We are fortunate to have an abundance of remarkable natural and cultural resources that travellers want to experience. To achieve the ambitious growth outlined in Vision 2020, we need a clear vision and strategy to enable us to maximize the economic and social value of tourism. The strategic directions in this vision and strategy are intended to guide an investment plan, shared focus, and unified action.

Unprecedented partnership is critical to the growth of tourism in Newfoundland and Labrador. Government, along with the Tourism Industry Association and Destination Marketing Organizations, recognize the value of working together to achieve goals. The establishment of a Tourism Board with a very clear commitment to guide the development and promotion of tourism is the first step on our journey. Moving forward, this organization must engage communities and all tourism stakeholders to deliver on the promise to our visitors.

Vision 2020 provides the overarching guidelines for developing our tourism industry. Government and industry working together, through the Tourism Board, will develop the implementation plan including roles, responsibilities, priorities, and timelines to make our vision a reality.

This is the most thoroughly considered and widely researched tourism vision ever created for Newfoundland and Labrador. Despite the market challenges and formidable barriers, there are significant opportunities open to us. Vision 2020 gives us the framework to forge a vibrant future, and grow an industry that will be a strong, long-term economic generator for our province.

For Newfoundland and Labrador, the journey to 2020 will be both challenging and exciting. But together, we will create something far greater than what any one person or organization could do alone. And as we prepare to welcome tomorrow's travellers from far and wide, we will let the world know that sometimes the best discoveries are just off the beaten path.

“To accomplish great things,
we must dream as well as act.”

- Anatole France