

# **TOURISM VISION EVALUATION**

**ANNUAL REPORT 2012**

## Introduction

In 2009, Newfoundland and Labrador launched its new tourism strategy ***“Uncommon Potential: A Vision for Newfoundland and Labrador Tourism”*** (Tourism Vision). Developed as a public private partnership, the Tourism Vision represents the result of an extensive consulting process among all tourism stakeholders of the province and provides a roadmap that will drive tourism development for the next decade. Under the guidance of the Newfoundland and Labrador Tourism Board, industry operators, industry associations, regional destination management organizations and government are addressing the challenges and issues tourism is facing in this province in seven strategic areas: leadership, transportation, research, product development, tourism technology, marketing and workforce development.

With an ambitious goal of achieving \$1.58 billion in tourism spending by 2020, it is crucial to create an industry environment that supports the development of authentic and unique experiences, attracting travellers – residents and non-residents alike – as well as providing local economic development and employment opportunities. Reaching the 2020 tourism spending goal is directly related to achieving the objectives in each of the strategic areas, and measuring our progress and tracking our achievements and challenges are crucial tools for success. This annual “report card” provides highlights of progress in each of the strategic directions, both in quantitative and qualitative terms. The 2012 edition of the report card reflects the accomplishments of all stakeholders over the past three years (2009-2011).

## About this Annual Report

The report is based primarily on the results achieved during the period 2009 to 2011, the first three years of the Tourism Vision implementation. The exception is tourism spending which is based on the reference year 2007. Actual spending for that year served as the basis to establish the spending goal of \$1.58 billion for 2020. Some information relating to 2012 has also been included.

The report contains quantitative as well as qualitative performance indicators that are organized according to the goals established within each Strategic Direction. Sources of the quantitative indicators are varied and include research conducted by the Department of Tourism, Culture and Recreation and other tourism/tourism-related organizations as well as other provincial or federal government sources. All quantitative indicators are listed by Strategic Direction in the Appendix to this report.

While the report is not entirely complete for every single indicator, every effort is made to receive input from all stakeholders to present a fair and comprehensive picture of our progress in implementing the province’s Tourism Vision. Qualitative indicators have been included to complement the quantitative information and to reflect issues and challenges that impact continued success or have not yet been tackled for various reasons. Sources of the qualitative information are also varied and include tourism organizations such as Hospitality Newfoundland and Labrador, the Destination Management Organizations, various annual reports and government departments.

## Reporting Progress and Success

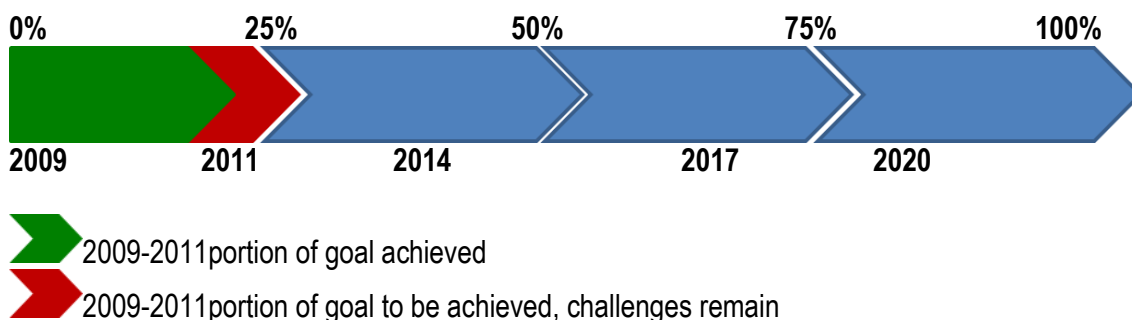
The purpose of this annual report is to track our progress as we implement the seven Strategic Directions of the Tourism Vision as well as to identify challenges and barriers impacting our success. In order to give the reader an idea of the progress made in each Strategic Direction, a

“progress bar” is being used as an attempt to visualize the “size” of the progress we have made and the challenges that prevented us to achieve more over the past three years. It should be viewed in relative rather than absolute terms as there is no formula to objectively calculate the size of each bar (with the exception of spending); in essence, the bar attempts to illustrate whether this is what we should have accomplished by now, whether we are a bit further ahead of where we expected to be at this point or whether we are somewhat behind expectations.

The Tourism Vision implementation period spans the 12-years between 2009 and 2020. To help illustrate the progress within each Strategic Direction, each three-year period can be viewed as representing 25% of the implementation period. The end of each three-year period can serve as a “benchmark” date against which we can measure progress, with 2011 representing the first 25% of the journey, 2014 as the half-way mark and 2017 as the 75% mark. 2020 will mark the end of the journey, representing 100% of what we want to achieve.

It is recognized, however, that setting implementation priorities will impact on what can be achieved in a three year period. As well, the magnitude of some challenges varies by goal and although being addressed, some challenges may not be resolved in the short-term. But as we continue our journey towards 2020, we would expect these challenges to be resolved over the long-term.

**Example:**



## THE JOURNEY BEGINS

In 2009, when Newfoundland and Labrador started implementing its Tourism Vision, the world economy suffered from the fallout of one of the worst recessions it had seen in recent history. “Staycations”, deal seeking and other spending-inhibiting travel behaviours were heavily impacting the tourism sector, resulting in declining visitation and spending worldwide. But in 2011 – only two short years later – tourism was again one of the fastest growing economic sectors in the world. With international tourist arrivals estimated to grow 3-4% and expected to reach the milestone mark of one billion, tourism in 2012 is one of the few bright spots in a world of economic uncertainty which has lingered persistently over the past few years. In many parts of the world, the tourism sector is driving economic progress as well as creating much needed jobs.

The province has not been isolated from these impacts yet has shown a level of resiliency that speaks for its ability to continue to attract visitors. With over 4 million trips and \$580 million<sup>1</sup> in spending, residents accounted for 90% of all trips and 58% of all spending in 2011 in Newfoundland and Labrador. Furthermore, after a seven-year gap<sup>2</sup>, the Department of Tourism, Culture and Recreation conducted a new Provincial Visitor Exit Survey in 2011 that yielded updated non-resident visitor information as well as the basis for an improved and more detailed process to estimate non-resident visitation and spending. Due to the new methodology, non-resident visitor and spending estimates for 2011 and onward are not directly comparable to estimates in previous years which were based on 2003/2004 Exit Survey results. With the new methodology, it is estimated that 459,100 non-resident visitors travelled to the province in 2011, spending \$424 million along the way – the most non-residents have ever spent here. The 2011 resident and non-resident spending estimates also take the province to a new milestone with reaching just over \$1 billion in provincial tourism spending.

In 2010, the province celebrated 518,520 non-resident visitors, surpassing the 500,000 mark for the first time ever. Although it appears that the province experienced a decrease in non-resident visitation with the 2011 estimates, it should be noted that over the period 2004-2011, a number of changes occurred affecting travel in and out of the province. If the 2011 methodology to estimate non-resident visitation were applied to 2009 and 2010 – years which arguably are more comparable to 2011 with respect to environmental factors than to 2004 – the province would actually show a continued upward trend, indicating that non-resident visitation to Newfoundland and Labrador has not lost any of its momentum. This is also true for tourism’s economic impact: between 2007 and 2010, tourism’s contribution to the provincial GDP increased 11.3%, from \$258.8 million to \$288.1 million, representing approximately 1% of provincial GDP.

2009 also saw the formation of Newfoundland and Labrador’s Tourism Board, comprising representatives from government, Hospitality Newfoundland and Labrador and the regional destination management organizations. The Tourism Board led the charge in the development of a multi-year Tourism Vision implementation and action plan, while advising and guiding all stakeholders along the path to success in 2020. The first three years of implementing the Tourism Vision have shown that this path is often very straightforward yet littered with unexpected turns, stumble stones and, at times, steep uphill. While presenting many challenges, the re-structuring of the tourism sector has taken good shape, with the re-focusing of the Destination Management Organization taking centre stage. Putting into place a solid financing structure, aligning and

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<sup>1</sup> Resident statistics are provided through Statistics Canada’s Travel Survey of Residents of Canada (TSRC). Due to a re-design of the TSRC in 2011, including conceptual changes, survey results in 2011 are not comparable to previous years

<sup>2</sup> The last Provincial Visitor Exit Survey was conducted in 2003/2004.

coordinating product development and marketing activities as well as concentrating on increased engagement of regional industry partners have been essential milestones on the path to achieving a responsive and adaptable tourism sector structure. The Tourism Board has also played a major role in engaging and communicating with stakeholders on this strategic vision as well as in advancing communication and coordination among provincial government departments which directly or indirectly impact the tourism sector.

When it comes to transportation, the Marine Atlantic ferry service and vehicle rentals are notable success stories, with both issues slipping off the “Top 3 Major Tourism Issues” list over the past three years. The 2009 study examining the rental vehicle industry not only resulted in an increased understanding of the industry but also brought the two sectors closer together as partners, driving a new approach in finding mutually beneficial solutions to issues affecting travellers. The introduction of three new vessels to the Marine Atlantic service since 2009 raised customer and industry expectations for improved customer service, increased service reliability and on time performance. In a September 2011 announcement, Marine Atlantic reported that it met these high expectations with significantly improved customer satisfaction levels – with 74% of customers highly satisfied compared to 51% in 2010 – as well as on schedule performance which increased from 59% in 2010 to 91% in 2011. Reliability also showed considerable improvements as only one sailing needed to be cancelled for maintenance reasons in 2011. In comparison, vessel breakdowns during the summers of 2009 and 2010 resulted in thousands of customers being rebooked to alternate sailings more than 24 hours from their original reservation. Despite the improvements in service and satisfaction levels of users, overall passenger and vehicle traffic on Marine Atlantic ferry services have continued to decline over the past three years, a trend that has been felt in the province for more than a decade. For the period 1999 to 2011, the number of passengers carried by Marine Atlantic has decreased, on average, 2.2% annually, with non-resident auto visitation declining at the same pace. In 2011, there were 5.3% fewer auto visitors to the province than there were in 2008, with actual visitation dropping from 114,000 to 108,000. It is notable, however, that the decrease is driven by a significant drop in visitation in 2011, as in both 2009 and 2010 the province welcomed more auto visitors (119,000 and 116,000 respectively) than in 2008 which was likely impacted by the global economic recession.

Reasons for this decline are manifold, including retail gasoline prices, ferry ticket prices, fuel surcharges and economic uncertainty. In addition, Newfoundland and Labrador has experienced exceptional growth in inbound non-stop seat capacity from its major source markets, giving travellers more options to access the province. Compared to 2008, airlines added over 164,000 non-stop seats to come into the province in 2011, an increase of 18% for the three year period. While air travel also suffered as a result of the recession, airport passenger movements have recovered to record levels, surpassing the 2-million mark in 2011.<sup>3</sup> While Newfoundland and Labrador are not immune to the impacts of the airlines’ operating environment (economic uncertainty, high fuel prices and slowing air traffic), comparatively high airfares to destinations in this province remain a major concern for the tourism sector.

The creation of the Tourism Research Division at the Department of Tourism, Culture and Recreation has brought a renewed focus to market research activities in support of maintaining the province’s momentum as competitive travel destination. Besides completing a number of tourism related studies (including vehicle rentals, tourism economic impact), the division has concentrated on conducting three major primary research projects to update its knowledge of resident and non-

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<sup>3</sup> Airport passenger movement counts include the province’s seven major airports (St. John’s, Gander, Deer Lake, Stephenville, St. Anthony, Goose Bay and Wabush)

resident travellers. While the Resident Travel Survey provided insights into travel attitudes, motivations and in-province trip experiences of Newfoundland and Labrador residents, the Labrador Travel Survey served as a benchmark study to identify priorities for the development and improvement of travel services and to identify tourism development opportunities in Labrador. One of the greatest research efforts over the past three years, however, has been dedicated to the Provincial Visitor Exit Survey which will not only offer new knowledge about non-resident visitors to the province but will also form the basis for updated estimates of non-resident visitation and spending.

It has been mentioned earlier that 2010 was a banner year for non-resident visitation and there is no doubt that the province's marketing efforts played a major role in attracting travellers to the province. However, product development initiatives and investment activities have also made a significant impact on the appeal of the province as a travel destination. During the three year period 2009-2011, over \$7.3 million have been invested in travel generators and premier tourist attractions such as the Discovery Trail, Twillingate – New World Island, Labrador, Marble Mountain Ski Resort, Salmonier Nature Park and the East Coast Trail. Additional funds, including funds provided to organizations directly or indirectly related to tourism, under various provincial government programs (Cultural Economic Development Program, Community Capital Grants, Job Creation Partnership and Regional Sectoral Diversification Fund) amounted to about \$25 million over the same period<sup>4</sup>. Another \$3-4 million were invested in provincial historic sites and provincial visitor information centres. Much effort has also been put into developing and expanding numerous festivals and events to celebrate the four seasons “Newfoundland and Labrador”-style, attracting residents and non-residents alike outside the summer peak travel season.

While government funding supports a wide range of tourism related activities, attractions and infrastructure, private investments have been equally essential to carry the sector's momentum. Operators' investments have not only been fostering growth in the tourism sector but have also been a significant driver of economic development in their respective regions. While the City of St. John's is currently seeing over \$100 million in investments in new hotel developments, other areas in the province have also been experiencing a number of accommodation expansion and upgrade projects. ACOA programming alone has supported over \$12 million in accommodations projects across the province between 2009 and 2011. Private investment has also been focused on improving tourism infrastructure, including the Shorefast Foundation's five star inn with conference centre, art gallery and heritage library (\$15 million). Additional investments during the 2009 to 2011 period totaling over \$4.3 million supported by ACOA programming involved replacing tour boats, expanding tour operations, upgrading alpine ski facilities and developing hiking trails.<sup>5</sup>

Many other organizations, including foundations, trusts, associations, historic societies, non-profit and regional development organizations as well as communities, are also contributing significantly to enhance the tourism experience by developing infrastructure such as trails, special event capacity and service facilities, hosting festivals and events, expanding local tourist attractions and creating improved programming at community museums or exhibits.<sup>6</sup>

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<sup>4</sup> Not a complete list of programs; total \$ amount reported refers to programs identified here, other programs to be identified and added in the future

<sup>5</sup> Reporting on private investments in the tourism sector is currently incomplete and limited to a small number of examples based on a limited number of information resources. Efforts are underway to identify additional information sources and to establish reporting guidelines and procedures to make reporting private investments as complete and comprehensive as possible

<sup>6</sup> A dollar figure for these investments cannot be reported due to incomplete sources of information. As well, investments in some of these projects are accounted for under government programs.

The success of these initiatives is evidenced by the fact that travellers are generally highly satisfied with their trips in this province, including 89% of recent resident travellers in the province (2010 resident survey) as well as 70% of residents and 73% of non-residents travelling in Labrador (2011 Labrador survey). Also, recent survey work among residents established that the province has much to offer outside the peak summer travel season, with 50% and 48% respectively of residents saying that the province is a great place to travel in the fall and winter. The survey also showed that half of residents are already multi-season travellers and only just over a third travelled exclusively in the summer. Despite this high satisfaction rate, tourism stakeholders are not resting on their laurels, having recognized the importance of offering high quality experiences to meet travellers' expectations and providing consistent service quality throughout the province. Quality Assurance, Market Readiness and Sustainable Tourism programs have started to take centre stage in the province to ensure travellers won't leave disappointed and keep recommending it to their friends and family. The implementation of these programs over the next few years will be critical to guarantee minimum business standards across all operators to meet travellers' expectations in today's fast changing and technology driven tourism environment.

The implementation of a tourism assurance plan will also be a key step towards embracing rapidly developing technology tools on a province-wide level. The ability to connect, communicate and share experiences with travellers is becoming more and more important for individual operators and the tourism sector as whole. However, while much has been accomplished in terms of providing an adequate communications infrastructure over the past few years, broadband access and a fast Internet remains a challenge for many operators. While broadband<sup>7</sup> availability in urban areas has been reported to be available to 99% of households in Newfoundland and Labrador (in 2009), rural areas are substantially lagging (availability reported at 66% in 2009, excluding wireless broadband). With many tourism operators located in rural areas, achieving the "always on" status is not a simple task. The \$7 million investment by the Provincial Government in broadband access, combined with Atlantic Canada's tourism partners'<sup>8</sup> investment in the TourismTechnology.com initiative (\$1.91 million between 2007 and 2012) are evidence that significant efforts are underway to develop a modern and strong technology infrastructure and enable the tourism sector to take advantage of advanced technology tools in marketing and delivering their products, services and experiences.

The Province of Newfoundland and Labrador is living proof that investing in marketing and targeted spending of advertising dollars is a recipe for success. The provincial tourism marketing budget (includes all activities) has more than doubled, increasing from \$6 million in 2004 to \$13 million in 2009 where it has remained over the past three years. In 2010, non-resident visitation was up 15.4% compared to 2004 while spending increased over 27% during the same period. Resident travel in the province has also continually increased since 2007. Starting in 2006, the province's unique advertising campaign has been credited by many tourism operators and other stakeholders for the industry's success in recent years and continues to be major differentiator in the province's approach to market itself to potential travellers. A number of survey results over the past three years is also testament that Newfoundland and Labrador has maintained a top of mind position among Canadian travel destinations.

As a destination with one of the highest rates for pre- and post-stays, the province is also a success story in the Meeting, Conventions and Incentive Travel market (MCIT), thanks to the efforts of Destination St. John's. With a total of 280 large events (50 or more room nights during at

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<sup>7</sup>Broadband is defined as download speeds of greater than 1.5 MBs per second

<sup>8</sup> Atlantic Canada tourism partners: ACOA, 4 Atlantic Canada provinces, Atlantic Canada provincial tourism industry associations

least one night of the event) during the three years 2009-2011, the city of St. John's welcomed more than 63,000 conference delegates and generated almost \$16 million in direct spending on accommodations. With a stable funding model in place, and in cooperation with other stakeholders and partners, the province's other Destination Management Organizations are also settling into their re-focused roles in their respective regions. A restructured provincial tourism website, a re-designed provincial traveller's guide, coordinated regional trade-show participation, the development of regional content for social media, the creation of regional travel packages and the establishment of new regional partnership models have been essential first steps to ensure province-wide streamlined marketing efforts and to create and maintain a consistent brand message across all tourism sector levels.

The people of this province and their culture, heritage and personal stories have always been an integral part of Newfoundland and Labrador's attractiveness for travellers. Many a travel experience is defined by personal encounters with locals, and the locals most likely to be part of these experiences are the tourism sector's "front line" workers, making tourism's workforce a critical element in driving the future success of the Tourism Vision. However, given the province's labour force situation, attracting and retaining dynamic, skilled and professional employees poses a significant challenge for the entire sector. Many operators and local attractions are already facing staffing issues or do not have funds available for appropriate staffing levels. As well, the tourism sector must compete for a relatively small labour pool with other industries such as mining, oil, construction and other services industries which often are in a better position to offer attractive compensation and benefits packages. On the positive side, average hourly compensation per tourism job has increased steadily since 2004 (from \$12.26 to \$20.86 in 2011, or 70% during this period) and surpassed compensation levels in the other Atlantic provinces as well as the Canadian tourism industry average (which was \$19.89 in 2011). However, it lags the average hourly compensation in the total provincial economy by almost \$9 per hour (\$29.60 in 2011). On the other hand, at 31.9 hours, tourism employees also worked 1.7 to 2.2 hours longer per week than their Maritime cousins but 2.9 hours less than all employees, on average, in the provincial economy.

It has been recognized that training and professional development opportunities are essential not only to attract and retain workers but also to provide a high level of service quality – a level of service quality that must be delivered to support continued tourism growth. Tourism's industry association, Hospitality Newfoundland and Labrador, has been playing a lead role in fostering positive attitudes towards training and skills development by delivering workshops to over 3,200 participants (2009-2011) and engaging in over 600 events to promote and increase the awareness of employee development and training opportunities. While the development of a five-year Tourism Workforce Strategic Enhancement Plan will identify those critical tasks required to address workforce skills and knowledge gaps, success in the long-term will also be defined by the extent to which we will be able to change perceptions of looking at training and professional development as an investment rather than a cost, design competitive compensation packages and identify new labour force sources.

As the journey to implement the tasks and activities of the Tourism Vision continues, the tourism sector and all its stakeholders can be proud of many accomplishments during a challenging start-up phase. As all stakeholders and partners settle into their new roles and tackle their diverse responsibilities, a solid foundation has been laid over the past three years that will ensure our ability to grow tourism as an economic engine in all regions of the province.



## TOURISM SPENDING

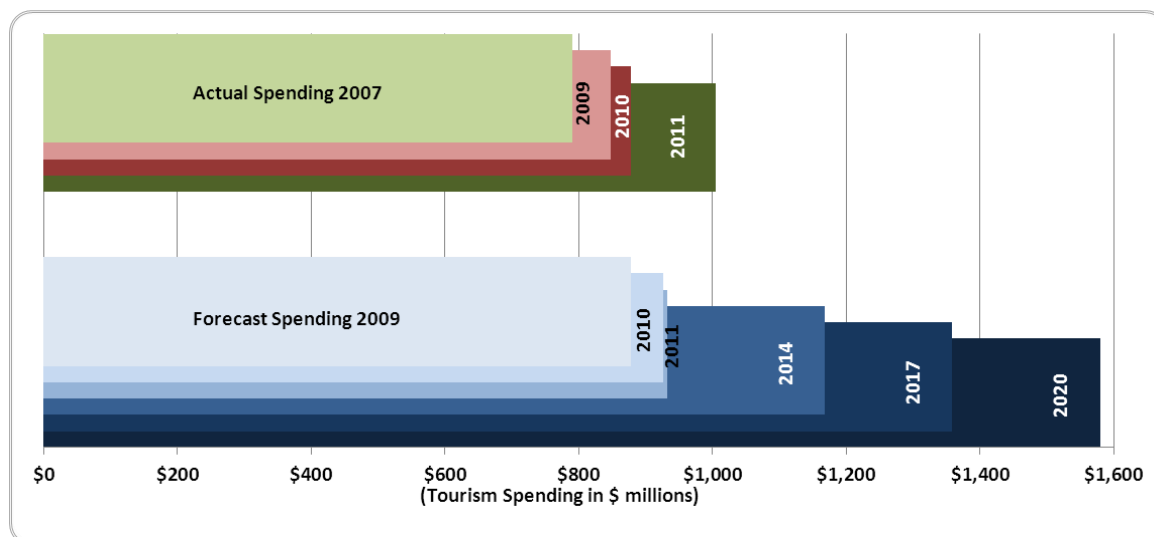
### Goal

Double tourism spending by 2020 (base: \$790M in 2007)

### Desired Outcomes

- Grow tourism spending to \$1.58B by 2020

### Results

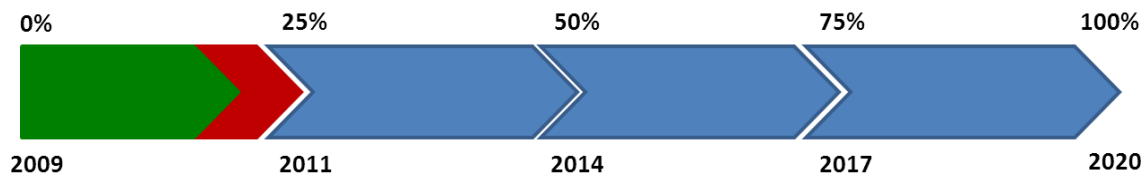


Note: Forecast spending for 2009 and 2010 is based on a compound annual growth rate (CAGR) of 5.5%; for 2011 at 6.0%, for 2012-2020 at 5.2%. Resident and non-residents shares of spending are assumed to remain stable at 55% and 45% respectively.

In 2007, tourism spending in the province reached \$790 million, with residents accounting for about 55% of this spending and non-residents for 45%. Based on this result, it is the tourism sector's goal to double spending to \$1.58 billion by 2020. Assuming that the resident and non-resident spending shares will be maintained, spending needed to grow at an average rate of 5.5% per annum for the period 2008-2020. In 2008, spending actually grew 7.2% but slowed considerably in 2009 (+0.1%) and in 2010 (+3.7%) due to the impact of the economic recession. For 2011, new methodologies to estimate resident and non-resident spending were developed, leading to total provincial tourism spending of just over \$1 billion. Compared to 2007, spending increased 27.2% in 2011 against a target increase of 17.9%. With an average annual growth of 6.2% since 2007, actual spending in 2011 was ahead 7.8% of the forecast target of \$931.6 million. Based on the actual spending results in 2011, a revised spending forecast for the period 2012-2020 indicates that the annual average growth rate needs to be at 5.2% from 2012 onward to reach the 2020 spending target.

Year	Forecast Spending	Forecast Annual Growth	Forecast Period Growth	Actual Spending	Annual Growth	Average Annual Growth	Period Growth	Difference to Forecast
2007	-	-	-	\$ 789.7	-	-	-	-
2008	\$ 832.9	5.5%	17.9%	\$ 846.7	7.2%	7.2%	27.2%	+1.7%
2009	\$ 878.6	5.5%		\$ 847.3	0.1%	3.6%		-3.6%
2010	\$ 926.7	5.5%		\$ 878.6	3.7%	3.6%		-5.2%
2011	\$ 931.6	6.0%		\$ 1,004.6	***	6.2%		+7.8%

## STRATEGIC DIRECTION 1: Private Public Leadership



The Tourism Board, comprised of industry, regional and government representatives, was established in June 2009 and has gained tremendous momentum in taking the lead role in aligning stakeholders efforts to implement the Tourism Vision. Using a number of channels, the Tourism Board has communicated extensively with all stakeholders to promote tourism's new strategy and achieve new levels of engagement of all partners in tackling priority tasks. With stable resources, an implementation plan in place and significant restructuring of the tourism sector underway, the Tourism Board can record a high level of success in its first three years of operation. Organizational capacity issues, further alignment of the industry and the need for increased coordination remain major challenges going forward.

## Goal 1.1

Establish a private public Tourism Board

### Desired Outcomes

- Define and communicate stakeholder roles and ensure support is provided for these roles
- Develop and prioritize a 3- to 5-year Tourism investment plan
- 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
- Ensure the appropriate tracking and accountability mechanisms are in place to monitor and measure success of implementing Vision 2020

Accomplishments	Challenges
Tourism Board	
<ul style="list-style-type: none"><li>• 3-year implementation and action plan developed</li><li>• Tracking and evaluation framework developed and approved</li></ul>	<ul style="list-style-type: none"><li>•</li></ul>
Organizational structure of tourism sector	
<ul style="list-style-type: none"><li>• Tourism Board established and required resources committed</li><li>• Established Central (2009), Eastern (2011) DMOs; revitalized Destination Labrador</li><li>• Coordination and realignment of the Destination Management Organizations - ongoing work with DMOs to define roles and responsibilities</li><li>• Stable financial support to DMOs established</li></ul>	<ul style="list-style-type: none"><li>• All government departments and agencies with tourism-related mandates need to be more strategically aligned and integrated</li><li>• Industry input into the strategic planning process is needed to ensure efforts remain focused on shared goals</li><li>• Need for higher level of coordination among industry partner organizations</li><li>• Higher level of engagement of DMOs in support of industry / product development projects required</li><li>• Building capacity in tourism related organizations</li></ul>

## Goal 1.2

Strengthen stakeholder communication

### Desired Outcomes

- Establish a formal, quarterly interdepartmental meeting between government departments with an active role in tourism
- 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

Accomplishments	Challenges
Stakeholder communications	
<ul style="list-style-type: none"><li>• Communications committee established; communications plan developed</li><li>• Several industry stakeholders and provincial government department working groups established</li><li>• Uncommon Potential website developed</li><li>• 2011 provincial road show “<i>Tourism Support For You</i>” with 9 sessions in various locations throughout province to increase tourism support program awareness among operators</li><li>• Tourism Board information sessions with almost all leading tourism organizations</li></ul>	<ul style="list-style-type: none"><li>• Provincial government interdepartmental meetings - greater involvement of some departments</li></ul>

### Goal 1.3

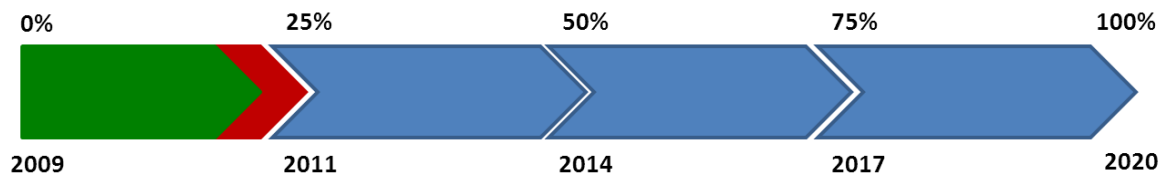
Lead through best practices

#### Desired Outcomes

- Identify and support best practices for leadership learning and development
- 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
- Identify and cultivate new industry leaders through known succession planning best practices

Accomplishments	Challenges
Leadership	
<ul style="list-style-type: none"><li>• HNL Conference re-focused on leadership messaging</li><li>• Governance training / DMO leadership building training</li><li>• Leadership in experience building in partnership with Gros Morne Institute for Sustainable Tourism, Bonavista Institute for Cultural Tourism, Signature Experiences Collection</li><li>• Tourism operator participation in Best Practices Missions through ACTP</li><li>• Support for industry participation in annual TIAC conference</li></ul>	<ul style="list-style-type: none"><li>• New leaders recruitment and development is still an informal process and provides an opportunity to be formalized through a leadership building strategy</li></ul>

## STRATEGIC DIRECTION 2: Sustainable Transportation Network



Some of the most visible progress in implementing the Tourism Vision has been achieved in the area of transportation. The Marine Atlantic ferry service as well as the rental vehicle situation have improved significantly and are true success stories. Major investments into provincial airport infrastructure, combined with vastly increased inbound airline seat capacity have contributed to easier access to the province while the implementation of a tourism oriented directional signage system (TODS) is well underway to enhance getting around the province. However, provincial ferry fleet infrastructure, especially to popular in-province tourist destinations, airfares to and within the province as well as planned budget reductions for federal agencies affecting tourism are a concern for the next few years.

## 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

### Desired Outcomes

- Improve air service, and build frequency and capacity to Newfoundland and Labrador
- Sustained funding for Marine Atlantic to improve services to Newfoundland and Labrador
- Marketing partnerships with key transportation providers to facilitate access to NL

Accomplishments	Challenges
Air Access	
<ul style="list-style-type: none"><li>• Provincial Air Access Strategy launched in October 2010</li><li>• New carriers, 18% increased inbound non-stop capacity and a 13% increase in air passenger movements at the province's 7 major airports in 2011 compared to 2008</li><li>• August 2011: Air Access Advisory Committee established</li><li>• Air access monitoring and tracking program established (CTC / Diio Mi database)</li><li>• \$57.2M investment in airport infrastructure renewal 2008-2011</li></ul>	<ul style="list-style-type: none"><li>• Inbound and intra-provincial air fares remain a concern</li></ul>
Marine Atlantic	
<ul style="list-style-type: none"><li>• 2010: \$521M committed to revitalize Marine Atlantic and renew its fleet and shore facilities at North Sydney, Port Aux Basques and Argentia</li><li>• 2011: 2 new vessels with increased capacity, improved customer satisfaction, on schedule performance</li><li>• Inclusion of tourism priorities in strategic planning</li><li>• Improved and consistent open dialogue with tourism organizations</li></ul>	<ul style="list-style-type: none"><li>• Federal budget 2012: projected "planned savings" for Marine Atlantic are \$ 0.5 million in 2012/13; \$ 2.2 million in 2013/14; and \$10.9 million in 2014/15)</li></ul>
Provincial Ferry System	
<ul style="list-style-type: none"><li>• Deployment of 2 new medium sized provincial ferries (St. Brendan's / Long Island and Little Bay Islands)</li><li>• Permanent winter ferry service Corner Brook to Blanc Sablon</li><li>• Budget 2012: \$5M to start construction of a new ferry for Fogo Island and Change Islands</li><li>• 2011: Working group committee to facilitate greater integration of provincial ferries as part of the tourism experience</li></ul>	<ul style="list-style-type: none"><li>• Capacity and fleet infrastructure</li><li>• Service inadequacy on routes affecting tourism, including Fogo Island / Change Islands and Labrador</li></ul>

## Air Access Facts & Figures



### St. John's International Airport

- Investment (all sources): \$167.2 million
- Project Period: 2011 – 2020
- Project Description:
  - Phase 1: Extension to the east end of the terminal building (2012 to 2016)
  - Phase 2: Extension to the terminal building's west end (2016 to 2018). Includes the installation of a \$25.8 million Category III landing system

### Gander International Airport

- Investment (all sources): \$10 million
- Project Period: 2012
- Project Description: Modernization of taxiway, electrical systems, lighting and drainage of existing 10,500-foot runway



### Deer Lake Regional Airport

- Investment (all sources): \$9.5 million
- Project Period: 2009-2010
- Project Description:
  - 610-metre runway extension from 1,830 to 2,440 m, new Instrument Landing System, new High Intensity Approach Lighting, new Precision Approach Path Indicators, new runway edge lighting
- Other projects
  - Dec 2011: expansion to its long term parking facility (145) from 532 to 677
  - Oct 2012: expansion to its long term parking facility (198 spaces) to 875



### Other Airports

**Wabush:** 2011 – \$2.1 million for roof restoration of the Air Terminal and Maintenance Buildings and South Airport Terminal Building parking upgrade

**Goose Bay:** 2010/2011 – \$13 million for Air Terminal Building Upgrade and Expansion to increase size of facility to 2,531 sq. ft.



## Air Access by the Numbers



\*Includes seven major airports in Newfoundland and Labrador: St. John's, Gander, Deer Lake, Stephenville, St. Anthony, Goose Bay and Wabush

Airport passenger movements: total number of passengers boarding and deplaning

## Economic Impacts of Select Provincial Airports

St. John's Airport Economic Impact		Deer Lake Airport Economic Impact		Gander Airport Economic Impact	
Employment (person years)	7,692	Employment (full-time equivalent jobs)	1,289	Employment (person years)	2,252
Income/GDP (total)	\$401.5 million	Income (total)	\$33.5 million	Income (total)	\$136 million
		Economic output (total)	\$214.7 million	GDP (total)	\$201 million
Government revenue (all levels)	\$83.7 million	Government revenue (prov/fed)	\$10.2 million	Government revenue (all levels)	\$32.1 million

**Note:** Due to varying methodologies used to determine the economic impacts of these airports by the respective authors of the reports, results for the three airports are not directly comparable with each other

### Sources:

- Strategic Concepts, Inc. and Wade Locke: *2009 Economic Impact Analysis of the St. John's International Airport*, 2011
- InterVISTAS Consulting Inc.: *Economic Impact of Gander International Airport*, 2006
- Hatch Mott MacDonald Ltd: *Deer Lake Regional Airport - Economic Impact Study* 2008, 2009

## Goal 2.2

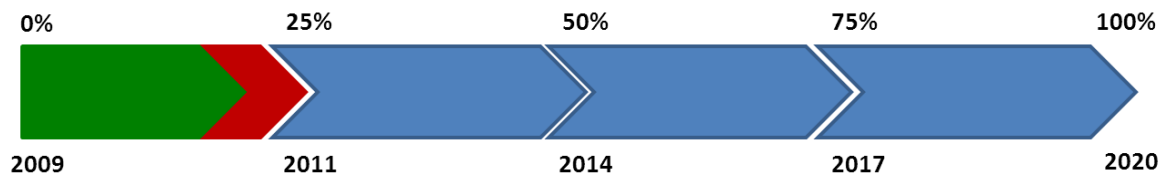
Ensure efficient and easy travel in and around the province

### Desired Outcomes

- Implemented TODS
- Increased use and support of way-finding technology
- Improved car rental services
- Improved intra-provincial ground transportation

Accomplishments	Challenges
<b>Tourist-oriented directional signage</b>	
<ul style="list-style-type: none"> <li>• Implementation of 2 pilot projects in 2010 (Bonavista Peninsula – 63 new signs / Northern Peninsula – 60 new signs)</li> <li>• Project evaluation in 2011 showed that new signs are effective</li> <li>• Draft of new signage regulations in progress</li> </ul>	<ul style="list-style-type: none"> <li>• No funds for TODS implementation in Budget 2012</li> <li>• New TODS legislation expected for 2013</li> </ul>
<b>Use of way-finding technology</b>	
<ul style="list-style-type: none"> <li>• HNL education efforts focused on location based marketing and way-finding opportunities</li> <li>• All tourism assets in the province are geo tagged with their GPS coordinates</li> </ul>	<ul style="list-style-type: none"> <li>• Gaps in broadband access in some areas of the province impeding on use of way-finding technologies</li> </ul>
<b>Provincial ground transportation</b>	
<p><b>Car rental</b></p> <ul style="list-style-type: none"> <li>• Vehicle Rental Services study completed in 2010</li> <li>• Cooperative program established between rental agencies and VICs - agencies provide daily reports of size and location of available capacity</li> <li>• Continued cooperation and increased rental fleet since 2009 resulting in a vast reduction of visitor complaints</li> <li>• Establishment of car rental working group</li> </ul> <p><b>Trans Labrador Highway</b></p> <ul style="list-style-type: none"> <li>• Phase III of the Trans Labrador Highway opened to the public in 2009</li> <li>• 504.3 km of road widened and 238 km hard surfaced of Phase I by the end of the 2010-11 construction season (anticipated to be finished by the end of 2014 construction season)</li> </ul>	<p><b>Car rental</b></p> <ul style="list-style-type: none"> <li>• Rental fees and availability of unlimited mileage remain a concern</li> </ul> <p><b>Trans Labrador Highway</b></p> <ul style="list-style-type: none"> <li>• Poor road conditions</li> <li>• Lack of cell phone service, rest stops, washrooms and emergency services</li> <li>• Very limited availability of ground transportation alternatives</li> </ul> <p><b>Other concerns</b></p> <ul style="list-style-type: none"> <li>• Cuts announced in 2012/13 budget to federal government departments and agencies affecting transportation, including Border Services Agency, CFIA</li> </ul>

### STRATEGIC DIRECTION3: Market Intelligence and Research Strategy



The creation of a dedicated tourism research resource at the provincial Department of Tourism, Culture and Recreation has brought renewed focus to ensuring timely and quality market research is available to all tourism stakeholders. Since its inception in 2009, the research division has completed primary research projects to update knowledge about resident and non-resident travellers as well as other studies to help address issues affecting future tourism development such as rental vehicles, the delivery of visitor information services or the impact of the Trans Labrador Highway on tourism. Partnered research has yielded additional insights into market trends, customer behaviour and labour force development. With these research projects as well as through improved access to secondary tourism and travel related research, the research division has accumulated an extensive amount of data and information that requires further analysis and dissemination. The spotlight of the next few years will be on developing proactive approaches to share this knowledge and information in a more timely manner with all stakeholders.

### Goal 3.1

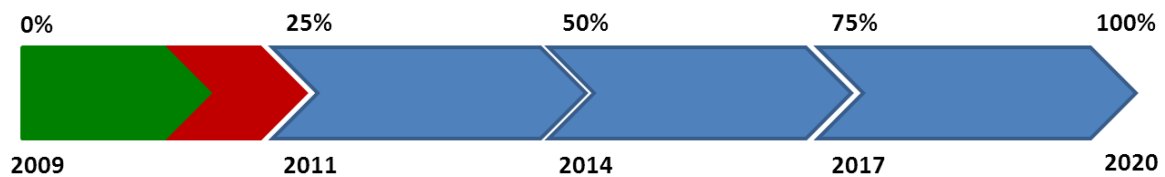
Develop and implement a research strategy and plan that provides industry and government with relevant and timely information and analysis

#### Desired Outcomes

- Consistent tourism research strategy
- New and expanded research partnerships increasing capabilities to develop and execute new research programs and to access specialized expertise
- Regular monitoring, review, analysis and reporting of secondary tourism-related research
- Established processes and channels for timely dissemination of research and analysis

Accomplishments	Challenges
Research priorities and budget	
<ul style="list-style-type: none"><li>• Completed three major primary research projects between 2010 and 2012</li><li>• Focus in 2012 on additional data analysis (e.g. Resident Travel Survey)</li><li>• Provincial Visitor Exit Survey: data cleaning, editing and weighting to be completed; preliminary results in late 2012</li><li>• Other studies completed, including Vehicle Rental study and Visitor Information Services review to address priority areas</li></ul>	<ul style="list-style-type: none"><li>• Activities and projects as per research plan 2012/13 deferred to 2013/14 due to budget constraints</li></ul>
Research partnerships	
<ul style="list-style-type: none"><li>• Several partnership projects at provincial / federal level</li><li>• Canadian Tourism Human Resource Council to develop Provincial Human Resource Module within the Tourism Satellite Account</li><li>• Participate as a regional partner with other Atlantic Canada provinces in CTC's Global Tourism Watch annual study of tourism performance and perceptions of Canada</li><li>• Other partnered projects at provincial / federal level: Travel Survey of Residents of Canada, International Travel Survey</li><li>• Supporting provincial regional organizations to facilitate their research projects</li></ul>	<ul style="list-style-type: none"><li>• Mostly request driven</li><li>• Requires more pro-active approach and better planning</li><li>• Need to establish mechanisms that foster regular communication of research information</li><li>• Annual report development delayed until 2012</li></ul>

## STRATEGIC DIRECTION 4: Product Development



Product and experience development has been a multi-faceted and comprehensive task that has required a significant amount of commitment and dedication at all levels of the tourism sector and across all types of tourism and tourism-related organizations. Not only did stakeholders and partners have to settle into new product and experience development roles and responsibilities but they also had to hit the ground running in identifying priority development and investments areas, coordinating regional efforts and supporting quality assurance and market readiness initiatives. Extending the tourism season through numerous festivals and events as well as considerable investments dedicated to the province's historic, cultural and heritage infrastructure have yielded tangible results with increased traveller visitation and tourism spending. The magnitude of this task requires focus, and while much has been accomplished in laying the groundwork for successfully developing unique, authentic and sustainable experiences, additional issues such as environmental sustainability and green tourism, will also require effort and direction.

## Goal 4.1

Develop and implement an experience strategy that resonates with sophisticated travellers, reinforces our unique brand, and increases our return-on-investment

### Desired Outcomes

- Increased variety of experience based products reflecting Newfoundland and Labrador's natural & cultural heritage
- Sustainable travel generators, monitored and updated over time
- Improved quality of existing attractions and experiences (enhanced market readiness)
- Improved regional product and experience development supported by government funding

Accomplishments	Challenges
Key product development projects	
<ul style="list-style-type: none"><li>• Season extension / multi-season tourism development progressing</li><li>• Season extension projects on Discovery Trail since 2006, in Western Newfoundland since 2009 (3-year programs)</li><li>• Successful expansion of numerous winter/spring/fall regional festivals/ events</li><li>• Implementation and Action Plan developed to guide investment in key travel generators - established priority investment criteria</li><li>• Several initiatives in all regions</li></ul>	<ul style="list-style-type: none"><li>• Overall sustainability of major tourism icons</li><li>• Inability to secure sufficient interpretation staff at major tourism attractions</li><li>• General staffing shortages</li><li>• Season extension efforts versus inability to maintain extended season at operator level<ul style="list-style-type: none"><li>○ Cash flow to extend tourism season</li><li>○ Shorter operating season at federal government operated attractions</li><li>○ Need for more coordination among all types of operators</li><li>○ Trickle down effects to other industries</li></ul></li></ul>
Quality assurance / market readiness	
<ul style="list-style-type: none"><li>• Workshops/seminars on enhanced product development, best practices, market readiness and tourism destination development</li><li>• Tourism Assurance Plan (TAP) in preparation; program to be launched in 2013, ongoing communication</li><li>• Review of Tourist Establishment Act as key component of Quality Assurance</li><li>• Market Readiness pilot opportunity in Central region for 20 tourism operators</li></ul>	<ul style="list-style-type: none"><li>• Concerns regarding providing consistent quality and experiences across the province and across operators</li><li>• Many tourism operators do not have websites</li><li>• Phone and e-mail systems are not being monitored and/or functioning properly</li><li>• Very few operators provide on-line reservation systems to customers</li><li>• Off-season processes are not defined</li></ul>
Regional product development support	
<ul style="list-style-type: none"><li>• Tourism Board Road Show 2011 in cooperation with DMOs to build awareness of available resources and funding</li><li>• Sustainable Tourism Expansion Project (STEP) in Twillingate – New World Island area</li><li>• Planning underway for Destination Development Project, to be rolled out regionally in 2013</li></ul>	<ul style="list-style-type: none"><li>• Need to establish regional product development priority lists</li></ul>

## Key Capital Projects

- Hotel development: 600+ additional rooms province-wide at 6 new hotels. Also includes additional meeting room space (\$112.5M)
- Port Rexton, Fisher's Loft Inn: addition of 7,000 sq. ft. conference centre and 12 rooms to existing inn (\$1.0M)
- Port Union, Canadian Iceberg Vodka Corporation: establishment of an iceberg demonstration centre for visitors (\$1.6-2.0M)
- Port Blandford, Terra Nova Resorts and Golf Community: resort renovation and expansion (\$10.0M)
- City of St. John's Convention Centre expansion
- City of St. John's Quidi Vidi village redevelopment, including space to promote arts and crafts (Quidi Vidi Plantation) (\$2.6M)
- Fogo Island, Shorefast Foundation: artist residency program, five-star inn with conference centre, art gallery, heritage library (\$25.0M)

Source: *The Economy 2012*, Economic Research and Analysis Division, Department of Finance

## Regional Product Development Initiatives

### Labrador

- *Cain's Quest Marketing Review*
- *Trapline Marathon marketing support*
- *Red Bay UNESCO World Heritage Bid*
- *Trans Labrador Highway Enhancement*

### Western

- *Season Extension – SnowWest, Trails, Tales and Tunes, Feather & Folk, Iceberg Festivals and OctoberWest*
- *Deer Lake Snowmobile HUB*
- *Gros Morne Cultural Blue Print*
- *Western Newfoundland Cruise Ship Development*

### Central

- *Snowmobile Tourism Enhancement*
- *Season Extension – Mid Winter Bivver Festival*
- *Central Rendezvous*
- *Tourism Operator Package Development*

### Eastern

- *Roots, Rants and Roars Festival*
- *Eastern Newfoundland National Geographic Geotourism Project*
- *Bonavista Peninsula Destination Hiking Trail Network*
- *Discovery Trail Geopark*

### St. John's

- *Sports Tourism Strategy*
- *St. John's Convention Centre expansion*
- *Meeting, conventions and incentive travel (MC&IT) sector development*

Source: Destination Management Organizations

## Goal 4.2

Continue to improve government-owned tourism infrastructure

### Desired Outcomes

- Renewed, vibrant system of provincial historic sites providing authentic experiences
- Provincial VIC network providing a variety of consistent, high quality services in modern, technology equipped facilities
- Improved availability and capability of provincial technology infrastructure
- Labrador tourism development

Accomplishments	Challenges
Provincial Historic Sites	
<ul style="list-style-type: none"><li>• Major Provincial Historic Site capital projects completed in Trinity, Commissariat House, Point Amour, Cupids, Mockbeggar Plantation and Cape Bonavista in 2008-11 (total investment \$2M); upgraded exhibits at Commissariat House and Trinity Visitor Centre; expanded trail system at Boyd's Cove Beothuk Interpretation Centre</li><li>• Cupids Cove Plantation Provincial Historic Site designated and added to the provincial system in 2010-11</li><li>• Enhanced programming and special events, new exhibits</li><li>• Improved strategic marketing</li></ul>	<ul style="list-style-type: none"><li>• Staffing issues impacting season extension efforts</li></ul>
Visitor Information Centres	
<ul style="list-style-type: none"><li>• Improvements to centre in Port-Aux-Basques; new construction in Whitbourne; infrastructure upgrades in Argentia</li><li>• Upgraded technology tools at the VICs, wireless Internet access at all VICs, staff training in technology use and use of new media tools for travel counseling</li></ul>	
Technology / communications infrastructure	
<ul style="list-style-type: none"><li>• \$7M investment in Provincial broadband initiative – rural initiative</li><li>• Pilot project to provide free Internet access in 5 provincial parks; user feedback survey completed, testing access reliability of various delivery mechanisms/user demand</li></ul>	



### *Other Initiatives*

- *\$21.6M Restoration of the Colonial Building and grounds for use as an interpretation centre, featuring the political history of Newfoundland and Labrador (federal/provincial cost-shared)*
- *\$1.1M, 1,900 square foot expansion of exhibition gallery at the Mary March Museum, a regional operation of The Rooms Corporation (\$856,000 funding by provincial government, \$262,000 support through the Department of Canadian Heritage's Canada Cultural Spaces Fund)*
- *\$1.5M repair and enhancement of the Seamen's Museum in Grand Bank*
- *\$205,000 Innovation Heritage Pilot Project launched on the Great Northern Peninsula to help community-based heritage organizations build capacity, improve operations and promote the region's heritage*



## **Labrador**

### **Labrador Tourism Development**

- Completed 2011 Labrador Travel Survey
  - Benchmark study to gain insights into travel activities, motivations, develop traveller profiles and identify tourism development opportunities
  - Identified priorities for the development and improvement of travel services
- Labrador tourism development plan
- Stakeholder consultations regarding tourism issues (sustainability of anchor attractions, TLH enhancements, market readiness, season extension)

### **Government Initiatives (Transportation and Works)**

- Continuation of widening and hard surfacing the Trans Labrador Highway
- Designation of the winter ferry services across the Strait of Belle Isle as a permanent service
- Financial contribution for an airport terminal expansion in Happy Valley-Goose Bay

### **2011 Labrador Travel Survey - Highlights**

- 794 respondents, with
  - 45% representing non-residents
  - 29% representing Labrador residents
  - 26% representing Island of Newfoundland respondents
- 65% of respondents travelled for vacation/pleasure
- Labrador was primary travel destination for 86% of Island respondents compared to 14% of non-residents
- Island respondents stayed for an average of 6.8 nights compared to non-residents' average of 4.1 nights
- 25% of non-resident respondents travelled the complete TLH between Blanc Sablon and Labrador West (Quebec Route 389)
- 42% of respondents were at least partially influenced in their decision to travel to Labrador by the completion of the TLH
- Scenic touring, pleasure walking in/around communities and iceberg viewing were the most popular activities among survey respondents during their Labrador trip
- Scenic touring, fishing, national and provincial historic sites were the most cited trip motivators
- 72% of respondents were highly satisfied with their trip to Labrador
- Respondents identified road conditions, availability of cell phone service, rest stops, washrooms and emergency services as issues impacting their experience travelling along the TLH

### Goal 4.3

Be a visible leader of environmental sustainability

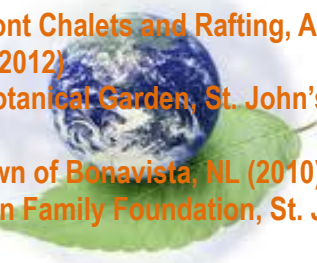
#### Desired Outcomes

- Industry environmental code of conduct developed and implemented
- Improved capability and knowledge of tourism operators regarding environmental sustainability
- Increased level of adopting environmentally friendly practices
- Tourism sector-wide awareness, education and incentive program supporting environmental sustainability

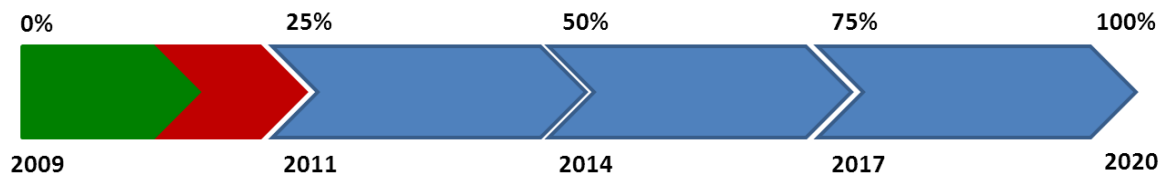
Accomplishments	Challenges
Development and adoption of Environmental Code of Conduct	
Current activities occurring at operator level	
Participation levels in awareness and education incentive program	
Current activities occurring at operator level	
Industry engagement in environmental best practices	
<ul style="list-style-type: none"><li>• 2011: curbside recycling project initiated in all 13 provincial parks</li><li>• As per the 2011 GLOBE Advisors report "Toward A Sustainable Future", there are 149 'sustainable tourism' businesses in the province</li></ul>	
Certifications under various environmental sustainability programs	
<ul style="list-style-type: none"><li>• 2012 Green Key certification: 10 hotels the province: Corner Brook (2), Gander (1), GFW (1), St. John's (5), Stephenville (1)</li></ul>	

#### Annual Sustainable Tourism Award

- Riverfront Chalets and Rafting, Aspen Brook (2012)
- MUN Botanical Garden, St. John's (2011)
- The Town of Bonavista, NL (2010)
- Johnson Family Foundation, St. John's (2009)



## STRATEGIC DIRECTION 5: Tourism Technology



Strengthening our communications technology infrastructure and facilitating the adoption of modern technology tools among all tourism stakeholders to market their products, services and experiences is nothing short of a Herculean task in a place with many unserved or underserved broadband access areas. While the provincial government and private businesses have committed close to \$30 million in 2011 alone for various projects throughout the province, many tourism operators remain challenged by broadband service shortfalls. Despite this barrier, the past three years have seen a definite increase in the number of tourism operators and partners embracing new technology tools that help them attract customers and enhance their services. A focus on investment and education in web-based collaborative tools, social media and e-commerce has helped operators to become more Internet savvy and create an online presence that will also be required in the near future to meet minimum service quality standards.

## Goal 5.1

Ensure all tourism partners and operators embrace technology as critical elements in attracting visitors and enhancing their experiences and services

### Desired Outcomes

- Improved tourism operator market readiness through the use of online marketing tools to provide information and manage customer relations
- Province-wide access to broadband internet services
- Continuous tourism operator engagement in emerging technologies to connect with other operators
- Easy, on-demand and interactive access to information services for travellers
- Utilize modern technology tools to deliver authentic traveller experiences
- Increased use of technology tools by industry to manage customer relations and provide customer service

Accomplishments	Challenges
<b>Operator support and technology adoption</b>	
<ul style="list-style-type: none"> <li>• Since October 2009: Over 400 participants in mentoring sessions, workshops or presentations</li> <li>• Continued investment in Tourismtechnology.com initiative</li> <li>• Quality Assurance and Market Readiness to provide tourism operators with the guidance needed to improve their understanding and adoption of relevant Internet tools</li> <li>• Advocacy activities to increase e-commerce readiness; growth in operators with online reservation and booking systems</li> </ul>	<ul style="list-style-type: none"> <li>• Some phone and e-mails systems are not being monitored and/or functioning properly</li> <li>• Very few operators provide on-line reservation systems to customers</li> <li>• Level of technology adoption relatively low among a considerable number of operators</li> </ul>
<b>Broadband internet services availability and access</b>	
<ul style="list-style-type: none"> <li>• 2011: IBRD - \$7M investment in rural broadband development initiative; implementation of 5 projects across the province</li> </ul>	<ul style="list-style-type: none"> <li>• Remaining unserved / underserved broadband access areas in parts of the province challenging operators to build and maintain online presence</li> </ul>
<b>Technology as an industry networking and information source</b>	
<ul style="list-style-type: none"> <li>• HNL focus on operator training and education in social media and webinar technology</li> <li>• HNL investments and increased efforts in online learning and collaboration enhancing all industry access to participate in training and education opportunities (workshops, information sessions)</li> </ul>	
<b>Government initiatives (information services, tourism experiences)</b>	
<ul style="list-style-type: none"> <li>• 2011: Department of Environment and Conservation pilot project to provide internet access in 5 provincial parks (wi-fi designated areas)</li> </ul>	

## **Government Broadband Initiative – 2011 Highlights –**

*5 projects awarded across Newfoundland and Labrador to increase access to broadband services (broadband = download speed greater than 1.5 Mb per second)*

### **LABRADOR**

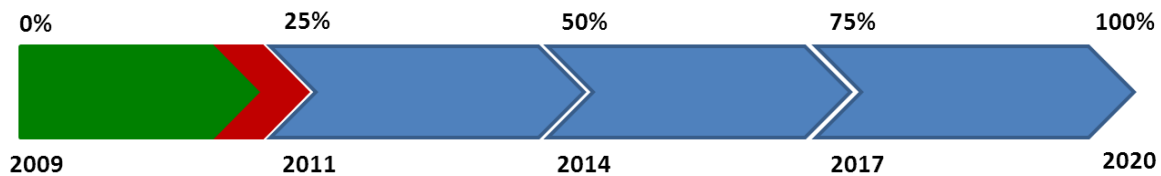
***IBRD (\$3M), ACOA (\$3M), Nalcor (\$8.3M) & Bell Aliant (9.7M) – total investment \$24M***

- *Construction of a pole line with an attached 48-fibre communications cable between Labrador west and Happy valley-Goose Bay*
- *Developed as the backbone of Labrador's broadband infrastructure*
- *Enhance high-speed Internet in Happy Valley-Goose Bay, Churchill Falls, Labrador City and Wabush*

### **ISLAND OF NEWFOUNDLAND**

- *Bell Aliant - Northern Peninsula, central, eastern regions (\$2.1M)*
- *Burgeo Broadcasting Systems, Ramea Communications – upgrade services to Ramea, Grey River and Francois (\$230,000)*
- *XploreNet Communicationns – implement a fixed wireless solution in central region (\$1.67M)*

## STRATEGIC DIRECTION 6: Brand Marketing



A prudent tourism marketing investment strategy by the provincial government over the past eight years has put Newfoundland and Labrador on many a travel itinerary. More than doubling the marketing budget has resulted in a globally recognized and award winning advertising campaign, high advertising and destination awareness among Canadians as well as in reaching the record-breaking milestone mark of more than 500,000 non-resident visitors in 2010. The creative 2011 “48 half hours” contest in cooperation with Westjet, the launch of the provincial and Destination St. John’s mobile tourism apps and the development of regional Facebook, Flickr and YouTube content have demonstrated that tourism stakeholders have made great strides in embracing innovative marketing tools. As well, a redesigned provincial tourism website and traveller’s guide with coordinated regional content are crucial results of streamlined and coordinated marketing efforts enabling all partners to better maintain a consistent brand message. With travel markets and consumer behaviour constantly changing and evolving, the results of the 2011 Provincial Visitor Exit Survey will play an essential role to provide fresh guidance for the province’s future marketing efforts.

## Goal 6.1

Continue to build differentiated tourism brand and leading tourism marketing position

### Desired Outcomes

- Use of innovative and non-traditional forms of marketing for special or niche opportunities
- Increased level of awareness, interest and conversion to actual visitation
- Improved competitive position as a travel destination
- Continuous efforts to take advantage of cost-effective marketing opportunities with federal / provincial partners

Accomplishments	Challenges
Non-traditional marketing partnerships	
<ul style="list-style-type: none"><li>• Republic of Doyle cross-Canada publicity tour leveraged to promote and increase awareness of Newfoundland and Labrador as a travel destination</li></ul>	<ul style="list-style-type: none"><li>• Limited opportunities</li><li>• Not proactively pursued due to lack of resources</li></ul>
Increased awareness, interest and competitiveness	
<b>Advertising</b> <ul style="list-style-type: none"><li>• Over 170 regional, national and international awards since 2006 (as of November 2012)</li><li>• Special campaigns<ul style="list-style-type: none"><li>○ 2010: Vancouver Winter Olympics – Atlantic Canada House</li><li>○ 2011: WestJet 48 half hours contest; Social Media Initiative of the Year at the 2011 TIAC awards</li></ul></li></ul> <b>Competitiveness</b> <ul style="list-style-type: none"><li>• Province reached milestone of 500,000+ non-resident visitors in 2010</li><li>• Province has outperformed other Atlantic provinces over the past few years on a number of measures</li><li>• Interest in and awareness of province as a travel destination increasing among all major target segments</li></ul>	
Marketing opportunities with federal / provincial partners	
<ul style="list-style-type: none"><li>• Leveraged CTC partner program to promote province in UK</li></ul>	



## Goal 6.2

Identify and pursue new and emerging market opportunities

### Desired Outcomes

- Multi-year strategic marketing plan
- TCR leadership in adopting new / innovative technology marketing tools and providing technology base that operators can take advantage of

Accomplishments	Challenges
Multi-year Strategic Marketing Plan	
	<ul style="list-style-type: none"><li>• Will be developed after completion of 2011 Visitor Exit Survey</li></ul>
Use of technologically advanced marketing tools	
<ul style="list-style-type: none"><li>• Use of social media since 2009 to reach special interest/niche activity groups</li><li>• Icebergfinder.com changes to improve reporting accuracy and timeliness</li><li>• TDMS Web Update: enhanced TDMS feature to allow operators quick and timely access to make changes to their profiles online</li><li>• Online marketing package program</li><li>• Launch of Newfoundland and Labrador Travel Guide iPhone/iPad app (for iOS 4.2 or later) in June/August 2012</li><li>• Destination St. John's mobile app for iPhone</li><li>• Increased engagement at all levels in social media marketing efforts<ul style="list-style-type: none"><li>○ DMO Facebook pages developed</li><li>○ Use of YouTube and Flickr</li><li>○ Broad utilization of user generated content</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Most business do not have a marketing plan</li><li>• Social media activities are not coordinated for effective marketing application</li><li>• Most operators are not taking advantage of the opportunities to participate in or capitalize on the power of the provincial marketing campaign</li><li>• Off-season processes are not defined</li></ul>

### Annual Tourism Atlantic Technology Awards

- Ocean Quest Adventure Resort (2012)
- Iceberg Quest Ocean Tours (2011)
- George House Heritage B&B, Dildo, NL (2010)
- MarbleZip Tours, Steady Brook, NL (2009)

### Goal 6.3

Ensure clear understanding of roles and responsibilities of all stakeholders in promoting the province as a destination

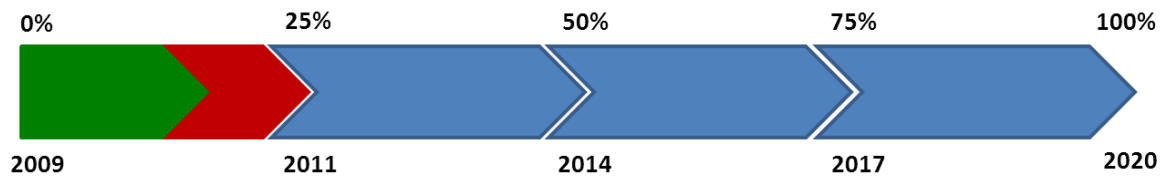
#### Desired Outcomes

- Maintain consistent tourism brand message across all tourism sector levels
- Increased tourism brand recognition and awareness
- Operators adopt and utilize marketing templates and toolkits to facilitate marketing efforts
- Streamlined and coordinated marketing and advertising efforts at provincial, regional & local levels

Accomplishments	Challenges
Operator support (tool kits, templates)	
<ul style="list-style-type: none"> <li>• <i>Tourism Support for You</i> resource package for DMOs</li> <li>• Tourism Board information sessions</li> </ul>	
Streamlined and coordinated marketing efforts at all levels	
<ul style="list-style-type: none"> <li>• Established Central (2009), Eastern (2011) DMO s; revitalized Destination Labrador</li> <li>• Restructured DMO mandate from marketing to management</li> <li>• Development of DMO 3-year strategic plans to establish coordinated marketing goals and activities</li> <li>• 2011: launch of re-designed provincial tourism website integrating DMO's online presence; DMOs managing their region's content using content management tools</li> <li>• Re-designed traveller's guide: Regional advertorial partnership model was created in time for the publication of the 2012 edition of the provincial travel guide</li> <li>• Increased outreach activities by DMOs in support of operators</li> </ul>	<ul style="list-style-type: none"> <li>• A number of sub-regional tourism organizations still working in isolation and getting funding</li> <li>• Higher levels of engagement of tourism operators required</li> </ul>



## STRATEGIC DIRECTION 7: Workforce Development



If there is one issue posing the largest challenges to tourism growth in the province, a good case can be made for tourism workforce development. While all provinces in Canada share similar challenges, the Newfoundland and Labrador tourism labour market is in a particularly tight situation: booming resource industries, an aging population and the appeal and perception of tourism occupations greatly impact the access of tourism businesses to an already limited labour pool. While many communities see tourism as a priority development sector, they are constantly plagued by a lack of supporting infrastructure, support services, financial means and available human resources to transform tourism into an economic engine. Although the industry has recovered well from the 2008/2009 recession, it is lagging the province overall in hourly compensation. Furthermore, professional skills development is in need of elevated awareness and perceived value. However, led by Hospitality Newfoundland and Labrador, efforts are well underway to alleviate the severity of staffing shortages and to raise the professional image of the tourism sector.

## 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

### Desired Outcomes

- Increased recognition of tourism as an important contributor to province's, regions' and communities' economic and social well-being
- Elevated image of tourism sector in communities

Accomplishments	Challenges
Marketing campaign demonstrating the social and economic value of tourism	
<ul style="list-style-type: none"><li>• Department of Advanced Education and Skills (AES) active in labour recruitment initiatives</li><li>• HNL has lead role in working with AES to focus recruitment and retention messaging for tourism sector</li><li>• TCR also working with AES to coordinate labour market issues</li></ul>	<ul style="list-style-type: none"><li>• Currently no plans for a specific marketing campaign</li></ul>
Elevated image of tourism in communities	
<ul style="list-style-type: none"><li>• Strategic plans of regional economic development boards reflect recognition of importance of tourism development<ul style="list-style-type: none"><li>○ Priority development sector in most economic zones</li><li>○ Focus on asset development, attraction enhancement, collaboration and partnerships with other tourism operators</li></ul></li><li>• HNL Tourism Excellence Awards<ul style="list-style-type: none"><li>○ Level of nominations increased over last few years</li><li>○ Increased activities to promote and raise awareness of winners (special profiling in local / community newspapers, profiling of nominees and winners in Tourism Times)</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Many communities challenged by<ul style="list-style-type: none"><li>○ Lack of supporting infrastructure</li><li>○ Critical mass of regional tourism product</li><li>○ Access - remoteness from larger centres</li><li>○ Accommodation capacity</li><li>○ Lack of awareness</li><li>○ Facilities in need of upgrading</li><li>○ Lack of support services</li></ul></li><li>• Many communities struggling to find financial means and other resources to keep attractions open during the peak season<ul style="list-style-type: none"><li>○ Reduced availability of funding</li><li>○ Reduced availability of employees</li></ul></li></ul>

## Goal 7.2

Focus efforts on attracting and retaining a skilled tourism workforce

### Desired Outcomes

- Recognition of the tourism sector offering dynamic and exciting work opportunities
- Broad range of job opportunities to keep skilled workers in the province
- Job opportunities offering competitive wage and compensation rates relative to other industries
- Increased focus on training, professional and skill development by tourism operators
- Highly skilled, dynamic, professional workforce to deliver quality services and experiences
- Increased use of training and education partnerships to facilitate training and development
- Broad range of training, education and professional development programs enabling required skills

Accomplishments	Challenges
<b>Competitive opportunities for skilled jobs</b>	
<ul style="list-style-type: none"> <li>• Over 1,000 jobs in tourism industries recovered in 2010 and 2011 from losses during recession in 2009</li> <li>• Overall, 5% more tourism jobs in 2011 but driven by part-time employment</li> <li>• Steady increase in average hourly compensation, surpassing Canadian average in tourism industries in 2011 for the first time</li> </ul>	<ul style="list-style-type: none"> <li>• Decrease in full-time tourism jobs</li> <li>• Rise in minimum wages concern for mostly small business operators in tourism sector</li> <li>• Changes to federal EI policies affecting seasonal workforce</li> </ul>
<b>Training and professional development programs</b>	
<ul style="list-style-type: none"> <li>• Tourism Training Needs and Industry Engagement Assessment completed in 2010</li> <li>• Identified development of 5-year Tourism Workforce Strategic Enhancement Plan and Tourism Industry Workforce Development Plan</li> <li>• Numerous HNL projects since 2007 relating to workforce or industry development</li> </ul>	<ul style="list-style-type: none"> <li>• Need to foster more positive attitudes toward training and skills development</li> <li>• Available training programs too general, with limited practical training</li> <li>• Low perceived value of available training</li> <li>• Low awareness of available training</li> <li>• Low awareness of available funding for training and skill development</li> <li>• Level of industry engagement</li> <li>• Disconnect between perception of “entry-level” hospitality jobs and need for professional skills development</li> </ul>
<b>Skilled professional, dynamic work force</b>	
<ul style="list-style-type: none"> <li>• 9 postsecondary institutions offering tourism related programs, degrees and certifications</li> </ul>	<ul style="list-style-type: none"> <li>• Staffing difficulties as labour market continues to change</li> <li>• Decreasing labour supply projections for the next 20-year period resulting in 3500+ unfilled jobs by 2030</li> <li>• Shift to older employees</li> <li>• Existing guidelines and policies regarding temporary foreign workers</li> <li>• Relationships with unions</li> </ul>

## APPENDIX: KEY PERFORMANCE INDICATORS

### TOURISM SPENDING

	2007	2008	2009	2010	2011
<b>Total tourism spending (\$M)</b>	<b>\$789.7</b>	<b>\$846.7</b>	<b>\$847.3</b>	<b>\$878.4</b>	<b>\$1,004.6*/**</b>
Non-resident spending (\$M) (1)	\$357.4	\$369.3	\$374.6	\$410.4	\$424.5*
<i>Air</i>	<i>\$278.5</i>	<i>\$297.1</i>	<i>\$299.7</i>	<i>\$335.0</i>	<i>\$327.0*</i>
<i>Auto</i>	<i>\$76.7</i>	<i>\$70.6</i>	<i>\$73.6</i>	<i>\$73.8</i>	<i>\$96.4</i>
<i>Cruise</i>	<i>\$2.2</i>	<i>\$1.6</i>	<i>\$1.3</i>	<i>\$1.8</i>	<i>\$1.3</i>
Resident spending (2)	\$432.3	\$477.4	\$472.7	\$468.0	\$580.2**

\*2011 based on 2011 Provincial Visitor Exit survey; results are not directly comparable to previous years due to change in methodology

\*\*2011 resident spending not directly comparable to previous years due change in methodology

**Source:** (1) Department of Tourism, Culture and Recreation Tourism indicator program

(2) Statistics Canada Travel Survey of Residents of Canada

### Impact of tourism spending on provincial economy

	2007	2008	2009	2010
<b>Tourism spending contribution to provincial GDP</b>	<b>\$258.8</b>	<b>\$273.8</b>	<b>\$274.5</b>	<b>\$288.1</b>
Tourism % of total provincial GDP	0.9%	0.9%	1.2%	1.1%
Labour income generated by tourism spending (\$M)	\$183.9	\$194.5	\$195.3	\$204.6
Person years of employment generated by tourism spending	7,836	8,401	8,376	8,419

**Source:** *The Economic Contributions of Tourism Spending in Newfoundland and Labrador*, Economic Research and Analysis Division, Economics and Statistics Branch, Department of Finance March 2012

### General indicators

	2009	2010	2011
<b>Non-resident visitation (1)</b>	<b>483,190</b>	<b>518,520</b>	<b>459,069*</b>
<i>Auto</i>	<i>118,688</i>	<i>116,189</i>	<i>108,054</i>
<i>Air</i>	<i>348,335</i>	<i>380,201</i>	<i>335,592*</i>
<i>Cruise</i>	<i>16,167</i>	<i>22,130</i>	<i>15,423</i>
<b>Resident trips (million) (2)</b>	<b>3.098</b>	<b>3.269</b>	<b>4.072**</b>
Residents taking in-province trips (3)		64%	
Roofed accommodation occupancy (1)	48.1%	50.1%	51.0%
Roofed accommodation average daily rate (1)	\$ 107.85	\$ 111.42	\$ 115.70
Room nights sold (1)	1,256,846	1,327,335	1,335,600
Cruise ship port calls (4)	107	133	89
Cruise ship ports (4)	35	48	38

\*2011 based on 2011 Provincial Visitor Exit survey; results are not directly comparable to previous years due to change in methodology

\*\*2011 resident number of trips not directly comparable to previous years due change in methodology

**Source:** (1) Department of Tourism, Culture and Recreation Tourism indicator program;

(2) Statistics Canada TSRC

(3) 2010 Resident Travel Survey, % respondents who travelled in-province over past 2 years

(4) Cruise Newfoundland and Labrador

## TRANSPORTATION

<b>Air access</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Airport passenger movements (1)	1,785,274	1,911,193	2,068,681
Inbound seat capacity (non-stop) (2)	936,516	1,036,589	1,068,203
Intra-provincial seat capacity (non-stop) (2)	392,052	382,438	404,724
Inbound average airfare* to NL (US\$) (2)	\$355	\$382	\$433
<i>Inbound average airfare to NL from Canada (US\$)</i>	<i>\$322</i>	<i>\$332</i>	<i>\$379</i>
<i>Inbound average airfare to NL from US (US\$)</i>	<i>\$335</i>	<i>\$358</i>	<i>\$377</i>
<i>Inbound average airfare to NL from RoW (US\$)</i>	<i>\$654</i>	<i>\$749</i>	<i>\$771</i>
Average intra-provincial airfares (US\$) (2)	\$287	\$263	\$295

\*Average airfares reported reflect those paid by passengers to travel agencies (including online travel agencies such as Expedia or Travelocity) and are one way net of taxes and fees.

**Source:** (1) Transport Canada, in co-operation with Airport Managers

(2) Diio Mi Air Access database

<b>Marine Atlantic</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
<b>Marine Atlantic government funding (\$M) (1)</b>	<b>\$121.5</b>	<b>\$202.2</b>	<b>\$171.8</b>
<i>Operations (\$M)</i>	<i>\$106.6</i>	<i>\$124.4</i>	<i>\$135.1</i>
<i>Capital (\$M)</i>	<i>\$14.9</i>	<i>\$77.8</i>	<i>\$36.7</i>
Marine Atlantic passenger movements (2)	397,737	383,576	365,397
Marine Atlantic passenger related vehicle movements (2)	138,273	132,532	127,333

**Source:** (1) Marine Atlantic Annual and Quarterly reports

(2) Marine Atlantic traffic reports

<b>Provincial ferries</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Marine operations budget (\$M)	\$90.4	\$94.0	\$87.8
Provincial ferry services (number)	18	18	18
Maintenance of existing ferries (\$M)	\$13.0	n/a	\$12.0
Maintenance of terminal buildings and wharves (\$M)	\$7.0	n/a	\$5.0

**Source:** Department of Transportation and Works (Annual Reports)

## PRODUCT DEVELOPMENT

<b>Traveller satisfaction</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Residents (most recent NL vacation trip) (1)		89%	
Residents: likelihood to recommend destination (1)		93%	
Non-residents (2)			
Non-residents: likelihood to recommend destination (2)			

**Source:** (1) 2010 Resident Travel Survey; % respondents indicating 8, 9 or 10 on 10-point scale

(2) 2011 Provincial Visitor Exit Survey; % respondents indicating 8, 9 or 10 on 10-point scale

<b>Residents – Seasonal Travel</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Travelled in spring / would consider travel in spring (1)	-	18% / 36%	-
Travelled in fall / would consider travel in fall (1)	-	39% / 25%	-
Travelled in winter / would consider travel in winter (1)	-	18% / 33%	-
Multi-season travellers (2)	-	50%	-
Summer-only travellers (2)	-	36%	-
<b>Perception of NL as destination for</b>			
spring trips (3)	-	38%	-
fall trips (3)	-	50%	-
winter trips (3)	-	48%	-

**Source:** 2010 Resident Travel Survey

(1) % of all travellers

(2) % of in-province travellers

(3) % rating NL 8, 9 or 10 on 10 point scale

<b>Participation in key activities – Residents</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Scenic touring	-	46%	-
Trail/wilderness hiking	-	27%	-
Culinary experiences	-	17%	-
Visiting historic sites/museums	-	14%	-
Attending local entertainment (music/theatre)	-	10%	-
Visiting National / Provincial Park	-	8%	-
Attending local festivals/events	-	6%	-

**Source:** 2010 Resident Travel Survey; most recent trip in NL

<b>Investment in key travel generators and other product development projects*</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Season Extension - Discovery Trail	\$300,000	\$300,000	\$300,000
Twillingate - New World Islands, Labrador	-	-	\$60,000
Marble Mountain Ski Resort	-	-	\$450,000
Salmonier Nature Park	-	\$1,600,000	\$4,000,000
East Coast Trail	\$205,000	\$107,749	

\*Provincial Government

<b>Other tourism related project funding*</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Regional Visitor Information Centres (1)	\$151,800	\$153,300	\$195,420**
Colonial Building (1)***	-	\$1,200,000	\$2,832,900
CEDP Heritage (1)	\$1,220,000	\$1,220,000	\$1,372,130
Other CEDP (1)	\$375,000	\$462,600	\$275,500
Community Capital Grant Program (1)	\$28,100	\$126,050	\$45,000
Job Creation Partnership (2)	-	\$1,325,122	\$1,181,039
Regional/Sectoral Diversification Fund (RSDF) (3)	\$4,700,000	\$4,000,000	\$4,400,000
IBRD – skills and market development for operators (3)	\$313,932	\$312,162	\$337,278

\*Provincial Government

\*\*includes \$37,620 in CEDP funding

\*\*\*Government allocations

**Source:** (1) Department of Tourism, Culture and Recreation

(2) Department of Advanced Education and Skills

(3) Department of Innovation, Business and Rural Development



<b>Government-owned infrastructure</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Provincial Historic Sites visitation (operating season)	45,355	48,821	50,938
VIC visitation (operating season)	132,168	136,751	136,276
PHS annual budget	\$950,000		\$1,267,800
VIC capital investment	-	-	\$500,000

**Source:** Department of Tourism, Culture and Recreation

## TOURISM TECHNOLOGY

<b>Investments in tourism technology</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Tourismtechnology.com*	\$855,000		\$1,056,000
Investments by industry	??	??	??

\*Investment periods 2007-2009 and 2010-2012

**Source:** Department of Tourism, Culture and Recreation

<b>Technology usage</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Tourism operators with websites (1)	-	88%	-
Accommodators with online reservation processing (1)	-	48%	-
Tourism operators using TDMS web update (2)	115 (9%)	169 (12%)*	133 (9%)
Accommodators using online occupancy reporting (2)	145 (18%)	286 (35%)	330 (42%)

\*Number impacted by use of special incentives

**Source:** (1) TourismTechnology.com Survey - Winter 2010

(2) Department of Tourism, Culture and Recreation

<b>Broadband* infrastructure</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Government investment in provincial broadband access (1)			\$7,000,000
Broadband availability (percentage of households) in NL (2)	78%	82%	82%
Urban (2)	99%	n/a	n/a
Rural (2)	66%	n/a	n/a
Number of households that can have broadband access (2)	155,000	163,000	171,000

\*Broadband defined as download speeds > 1.5 Mbps

**Source:** (1) Department of Innovation, Business and Rural Development

(2) CRTC Communications Monitoring Report; excludes HSPA+ (Evolved High-Speed Packet Access, wireless broadband)

## BRAND MARKETING

<b>Marketing investments</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Annual TCR marketing budget (\$M) (1)	\$13,000,000	\$13,000,000	\$13,000,000
DMO Funding (TCR, IBRD, ACOA) (2)*		\$600,000	\$1,048,530
Industry investments**			

\*Some amounts may also be included elsewhere

\*\*Includes items such DMO membership fees, accommodation tax and partnership fees (will be added once data sources and procedure to collect the data have been identified)

**Source:** (1) Department of Tourism, Culture and Recreation; includes all TCR activities and costs

(2) DMO Annual Reports

Non-traditional partnerships	2009	2010	2011
Republic of Doyle cross-Canada publicity tour	-	-	\$20,000

Source: Department of Tourism, Culture and Recreation

Marketing opportunities with federal / provincial partners	2009	2010	2011
CTC programs			
<i>UK Media Campaign - spending</i>	-	-	\$ 195,000
<i>UK Media Campaign - value</i>	-	-	\$ 474,000
ACTP programs*	\$ 6,650,000	\$6,650,000	\$ 6,650,000

\*\$19.95M total investment of all 4 Atlantic Provinces over 3 fiscal years each (2009/10 through 2011/12 and 2012/13 through 2014/15)

Source: Department of Tourism, Culture and Recreation

ROI on media investments	2009	2010	2011
US Market - media buy	\$150,791	\$630,627	\$828,856
US Market - ROI	\$52.29	\$9.90	\$9.56

Source: ACTP - NL Travel Intentions Survey

Level of awareness of / interest in province as a travel destination	2009	2010	2011
Website visits and inquiries (1)			
<i>Inquiries</i>	64,119	57,500	51,942
<i>Website visits (newfoundlandlabrador.com)</i>	1,077,590	1,197,727	1,199,276
<i>Time spent on website</i>	4:19 min	4:03 min	4:26 min
<i>Bounce rate (single page visits)</i>	41.76%	47.60%	47.64%
Advertising recall / awareness (2)			
<i>Ontario</i>	82.9%	83.5%	
<i>Maritimes</i>	81.8%	80.8%	
<i>Quebec</i>	55.4%	54.4%	
<i>Alberta</i>	80.4%	81.6%	
<i>British Columbia</i>	74.3%	74.2%	
<i>Other Canada</i>	73.8%	73.1%	
<i>US</i>	24.3%	29.9%	
<i>Other countries</i>	24.1%	25.3%	
Advertising recall among NL Residents (3)		82%	
Unaided awareness of advertising for Canadian destinations - NL (4)	3.3%	3.2%	4.1%
Unaided destination awareness - NL (4)	2.2%	2.2%	1.7%
Canadian Provinces visited (past 3 years): visited NL (4)	4.3%	4.2%	4.0%
Likely to take vacation trip of 4+ nights to NL (5)	5.8%	7.0%	7.2%

Source: (1) Inquiries for travel guides and related material from all sources including web, e-mail, telephone and other correspondence

(2) ACTP - NL Travel Intentions Survey

(3) 2010 Resident Travel Survey; % of all travellers

(4) Global Tourism Watch - Canada Study; Canadian out-of region pleasure travellers

(5) Global Tourism Watch - Canada Study; those likely to travel within Canada in the next year

<b>Non-resident visitation to Atlantic Provinces (year-over-year change)</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Newfoundland & Labrador (visitors, all modes of transportation) (1)	0.6%	7.3%	
Nova Scotia (Visitors, all modes of transportation) (2)	0.6%	-6.6%	0.0%
New Brunswick (2)			
Prince Edward Island (non-resident automobile traffic on Confederation Bridge) (2)	9.1%	-0.4%	-6.7%

**Source:** (1) Department of Tourism, Culture and Recreation Tourism indicator program  
(2) Other Atlantic Provinces tourism indicator programs (websites)

<b>Meeting, conventions and incentive travel - St. John's</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Number of large events (50 or more room nights)*	81	95	104
Large event room nights	36,472	43,304	44,425
Number of delegates	17,500	22,900	22,700
Small event room nights (10 to 49 room nights)*/**	-	-	28,853

\*During at least one night of the event

\*\*Tracked for the first time in 2011

**Source:** Destination St. John's

## WORKFORCE DEVELOPMENT

<b>Tourism industries - jobs*</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Total jobs in tourism industries in NL (1)	<b>16,460</b>	<b>16,765</b>	<b>17,581</b>
<i>Transportation</i>	<i>2,926</i>	<i>3,017</i>	<i>3,123</i>
<i>Accommodation</i>	<i>2,584</i>	<i>2,643</i>	<i>2,691</i>
<i>Food and beverage</i>	<i>9,068</i>	<i>9,194</i>	<i>9,768</i>
<i>Recreation and entertainment</i>	<i>1,426</i>	**	**
<i>Travel services</i>	<i>460</i>	**	**
<i>Total economy Newfoundland &amp; Labrador</i>	<i>204,065</i>	<i>210,675</i>	<i>218,675</i>
Tourism as % of total Newfoundland and Labrador economy	8.1%	8.0%	8.0%
Full-time jobs	11,640	12,142	11,519
Part-time jobs	4,820	4,625	6,063

\*The number of jobs includes all jobs required to produce commodities in the tourism industries whether they are consumed by visitors or by local residents

\*\*Data not reported by Statistics Canada to meet the confidentiality requirements of the Statistics Act

**Source:** Provincial Human Resource Module Phase II report (CTHRC), November 2012

<b>Tourism industries - workforce characteristics</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Male employees*	6,147	6,143	6,292
Female employees*	9,619	9,875	10,573
15-24*	5,066	4,730	5,301
25-34*	**	3,048	3,178
35-44*	**	2,690	2,709
44+*	4,972	5,550	5,676

\*Employee jobs only, excludes self-employed

\*\*Data not reported by Statistics Canada to meet the confidentiality requirements of the Statistics Act

**Source:** Provincial Human Resource Module Phase II report (CTHRC), February 2013

<b>Tourism industries - hours worked and compensation</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
<b>Average weekly hours worked per job</b>	<b>33.9</b>	<b>33.5</b>	<b>31.9</b>
<i>Canadian average (Tourism industries)</i>	29.1	28.9	28.8
<i>Total economy Newfoundland &amp; Labrador</i>	34.7	34.4	34.8
<b>Average hourly compensation per job</b>	<b>\$17.92</b>	<b>\$19.30</b>	<b>\$20.86</b>
<i>Canadian average (Tourism industries)</i>	\$18.81	\$19.38	\$19.89
<i>Total economy Newfoundland &amp; Labrador</i>	\$28.22	\$28.86	\$29.60

\*Employee jobs only, excludes self-employed

**Source:** Provincial Human Resource Module Phase I report (CTHRC), December 2011

<b>Number of graduates from formal tourism education programs*</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Graduates	13	24	12

\*Includes public and private post-secondary institutions

**Source:** Department of Advanced Education and Skills

<b>Employee training and development (HNL)</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Workshops (participants) (1)	1,175	1,366	696
Awareness and promotional activities (2)	210	270	168
emerit products sales/downloads (3)	487	315	429
emerit Professional Certification registrations	36	12	16
emerit Professional Certification completions	15	34	24

**Source:** Hospitality Newfoundland and Labrador

(1) Workshops include Superhost, Sales Powered by Service, It's Good Business, occupation-specific workshops, Ready-to-work

(2) Number of events including meetings, presentations, job fairs

(3) Includes online modules, workbooks, exams, information booklets

## MARKET RESEARCH - ACTIVITIES SUMMARY -

2009	2010	2011	2012
Visitor exit survey – Planning Phase I	Visitor exit survey – Planning Phase II	Visitor exit survey – Implementation	Visitor exit survey – Data cleaning, editing, analysis and reporting
Vehicle Rental Industry Study			
	Resident Travel Survey – Implementation	Resident Travel Survey – Analysis and reporting	Resident Travel Survey – Additional analysis and reporting (special requests)
		Labrador Travel Survey – Implementation	Labrador Travel Survey – Analysis and reporting
	Visitor Information Services Review		
Air Access Tracking program (InterVISTAS)		Air Access tracking program (CTC – Diio Mi) year 1 (Aug 2011)	Air Access tracking program (CTC – Diio Mi) year 2
		Economic Impact of Tourism study	
	CTHRC 2010: Pilot project for a Provincial HRM of the TSA – 1997-2009 statistical time series for tourism labour market estimates (jobs, employment characteristics, earnings; CTHRC 2011-13: Provincial HR Module		
	CTC: Global Tourism Watch - Canada Study (Year 4)	CTC: Global Tourism Watch - Canada Study (Year 5)	CTC: Global Tourism Watch - Canada Study (Year 6)
		Kittiwake Economic Development Corporation: Fogo Island / Change Islands Travel Survey	