

Transition.  
Transform.  
Thrive.

A Tourism Vision and Strategy  
for Newfoundland and Labrador

# A Message from the Premier



## The Honourable Andrew Furey

Premier of Newfoundland and Labrador

I am proud to support Newfoundland and Labrador's new 2022-2026 Tourism Vision and Strategy.

Newfoundland and Labrador's reputation as a tourism destination is legendary. The industry has seen tremendous success and continues to be a vital contributor to both the province's economy, with annual expenditures totalling more than \$1 billion, and the province's sociocultural landscape.

Tourism is not just a significant industry for Newfoundland and Labrador because of its economic and employment impact. This is also an industry that offers experiences that celebrate and promote our people, culture, history, heritage, stories and natural environment. As a result, tourism not only contributes to the economy but also to the sociocultural vibrancy and environmental well-being of the province.

Our Government values tourism as a key economic growth sector, especially as we navigate the road to recovery after the past few years. I am confident that this new focus and strategy will help to build greater resilience and grow the industry to new heights and achievements.

I extend my thanks and appreciation to Minister Crocker and the staff at the Department of Tourism, Culture, Arts and Recreation. I would also like to recognize the tourism leaders and operators who helped support and steer this process, including Hospitality Newfoundland and Labrador, the Newfoundland and Labrador Tourism Board, and members of the Premier's Advisory Council on Tourism.



## A Message from the Minister

### The Honourable Steve Crocker

Minister of Tourism, Culture, Arts and Recreation

As Minister of Tourism, Culture, Arts and Recreation, I am proud to present the 2022-2026 Tourism Vision and Strategy.

This strategy is the result of a tremendous amount of hard work, dedication and collaboration on the part of both our department and our industry partners. Thank you to all stakeholders for their input, participation, cooperation and support. One of our biggest strengths as a competitive destination is how well we work together. We have proven that if we work together to advance our collective goals, we can achieve great things.

The impact of the tourism industry on our provincial economy pre-Covid-19 cannot be understated, and it is imperative that we regain our footing in this global marketplace. The tourism industry before the pandemic was strong with healthy growth. With Come Home 2022 just about behind us, we have received positive feedback from our partners and tourism numbers were very strong during 2022. However, full recovery will take time and with this new vision, we now have a renewed focus. We have the opportunity to enter into our recovery with a clear blueprint for how we can grow beyond previous levels of visitation and spending. As we focus on the vision's eight pillars, we will move past recovery, transforming into the thriving tourism destination we know we have the potential to be.

I am most optimistic for a bright future for tourism in Newfoundland and Labrador. I look forward to continued collaboration with all tourism stakeholders in the weeks, months and years ahead.



## A Message from Hospitality Newfoundland and Labrador

### Brenda O'Reilly

Chair, Hospitality Newfoundland and Labrador

As tourism operators, it is our honour to welcome the world back to Newfoundland and Labrador following a pandemic that constrained travel across the globe.

From entire nations, to sectors, and through to individual businesses, we've all had to emerge from the pandemic with renewed focus and refined business practices in an effort to compete in a post-Covid world.

The tourism industry in Newfoundland and Labrador has used the opportunities and challenges of these last years to create a new vision for tourism — one that builds on the successes of Vision 2020 and positions tourism in this province to recover and grow as a major economic contributor into 2026 and beyond.

On behalf of Hospitality Newfoundland and Labrador, the industry is committed to the 2022-2026 Tourism Vision and Strategy. The framework presented in the Vision has been developed to address the specific needs of the tourism sector and provide guidance to our private-public partners through a unified Vision to ensure that we Transition, Transform and Thrive.

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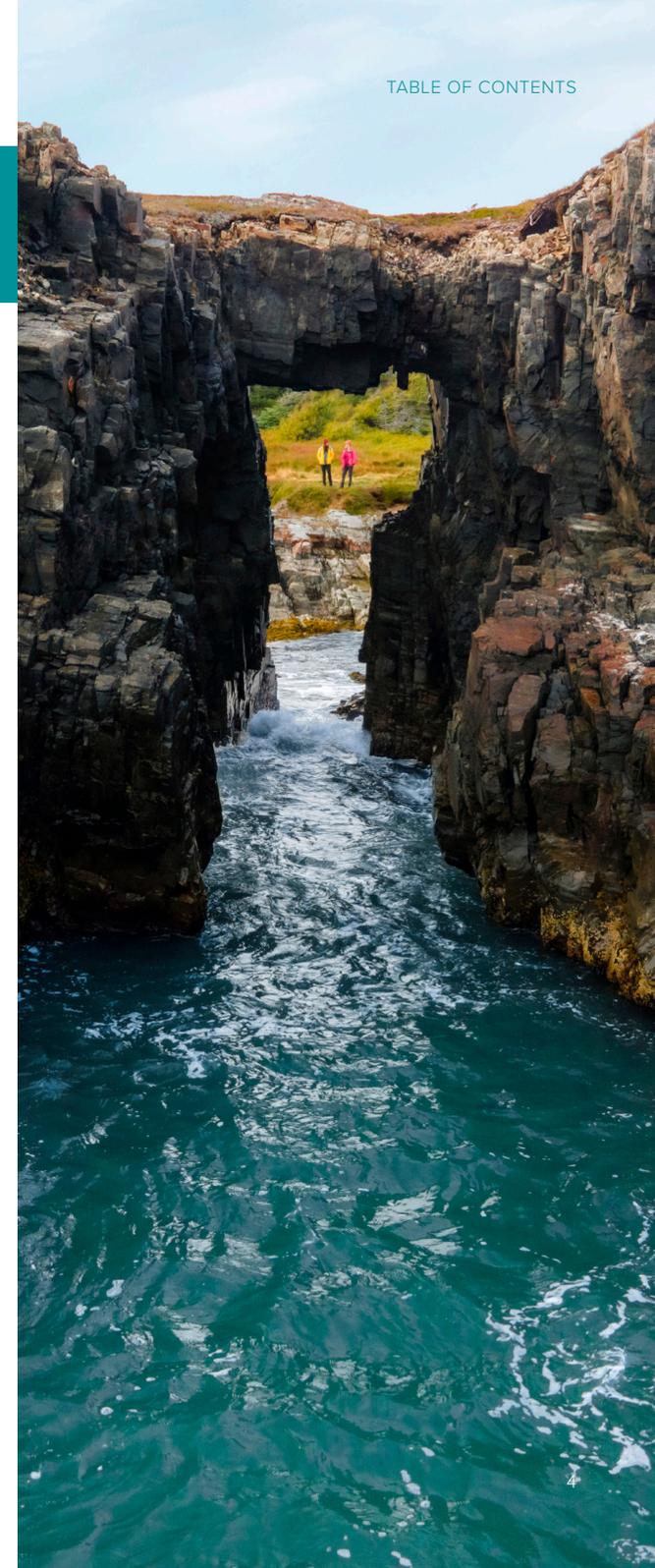
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# Executive Summary



Under the guidance and leadership of the Newfoundland and Labrador Tourism Board, the ten-year tourism growth strategy, *Uncommon Potential: A Vision for Newfoundland and Labrador Tourism (Vision 2020)* helped grow tourism to reach over **\$1.2 billion** in annual tourism spending and **20,000 jobs** in the tourism industry.

Now, this private-public partnership board, as well as key industry stakeholders and partners, have collaborated once again to lay out a new vision for tourism; one that transitions the tourism sector through its recovery from the global pandemic to transform Newfoundland and Labrador into a thriving tourism destination.

Prior to 2020, tourism was one of the fastest growing sectors in the world and it is undoubtedly one of Newfoundland and Labrador's success stories. The tourism sector in Newfoundland and Labrador is a vital economic contributor with tourism expenditures consistently totalling **\$1 billion** or more annually from 2011 to 2019. Over a 10-year period from 2009 to 2019, tourism spending by residents and non-residents in Newfoundland and Labrador grew by approximately 3.6 per cent annually and the sector

continues to support 20,000 jobs in tourism-related industries. As an export sector, tourism generates new money for the provincial economy and for communities throughout Newfoundland and Labrador.

Tourism has seen drastic changes in the past two years as a result of the Covid-19 pandemic and there are a number of key shifts and challenges that will impact the tourism industry through its recovery from the pandemic. These include lack of access and reduced transport connectivity, labour and skills shortage, higher travel costs associated with high consumer demand and reduced supply and capacity, reduced business travel and events, product degradation, reduced access to capital and limited liquidity, and the shift in capacity and role of destination management organizations.



## The Newfoundland and Labrador Tourism Board was established in 2009 and includes the following organizations:

- Hospitality Newfoundland and Labrador
- Destination St. John's
- Legendary Coasts of Eastern Newfoundland
- Adventure Central Newfoundland
- Go Western Newfoundland
- Destination Labrador
- Department of Tourism, Culture, Arts and Recreation (TCAR)
- Department of Industry, Energy and Technology
- Atlantic Canada Opportunities Agency

In terms of market trends arising as a result of the pandemic, it is predicted that the industry will see more frictionless travel supported by enhanced technology, an emphasis on more domestic travel as some travellers remain uneasy about travelling far from home, and a shift to more responsible travel with a socio-environmental focus. Industry experts also predict a greater interest in the well-being of communities and residents in destinations and less focus on visitation growth as the main goal of the tourism industry. There is also greater consumer interest in Indigenous tourism, outdoor and nature-based activities, health and well-being experiences, affluent and retiree travel, and opportunities to work remotely.

International travel demand will likely remain suppressed and is not expected to fully rebound until 2025-2026 due to significantly curtailed business travel access, capacity and other global challenges. However, the outlook for domestic travel remains positive and will continue to drive tourism recovery into 2023. Increased levels of comfort with travelling in general, using all forms of travel-related transportation options, bode well for more travel activity in the near term. Nearly two-thirds of Canadians reported travel



as their top spending priority ahead of longer-term savings, paying down debt, and home renovations. Offsetting factors are travel costs, health risks and rising fuel prices, which have been identified as the top perceived barriers to travelling within Canada.

**Nearly two-thirds of Canadians reported travel as their top spending priority ahead of longer-term savings, paying down debt, and home renovations.**



Evidence suggests that competitive destinations are creating well-balanced tourism and travel recovery strategies designed to effectively navigate through the build back of their respective visitor economies. This ensures that as visitation levels increase, sector capacity grows responsibly with it, enabling the industry to deliver a consistently high level of quality in visitor experiences while growing the sector back to a newly defined and sustainable footing. These factors are seen as key shifts to monitor and respond to in 2022 and beyond.

With Newfoundland and Labrador's unique selling proposition aligned with changing customer travel values, behaviours and preferences, the province

is strongly-positioned to responsibly grow visitation and tourism spending. By taking this opportunity to make necessary investments, Newfoundland and Labrador's powerful tourism brand, successful marketing campaigns, rich, authentic local experiences and warm, welcoming people that connect deeply with visitors, will provide the base upon which the industry is rebuilding to rise to new heights of tourism success. The 2022-2026 Tourism Vision and Strategy (Vision 2026) builds on this solid foundation to accelerate responsible growth and evolve Newfoundland and Labrador into a thriving tourism destination.

As Newfoundland and Labrador tourism sets out on its new strategic path, the impacts of the pandemic will continue to be felt and affect every facet of the tourism ecosystem. Although 2021 and 2022 have demonstrated that tourism is well on its way to recovery, this recovery remains fragile. The threat of new and more contagious variants as well as related health and safety measures will affect travel confidence in the short term, while a challenging economic environment will put additional pressure on the recovery of global tourism.

This document lays out a holistic strategy to enhance Newfoundland and Labrador's

competitiveness and identifies a regenerative tourism leadership framework to serve the sector over the long term. It is the blueprint for a dynamic provincial tourism ecosystem that is constantly evolving in the face of challenging environmental and sociocultural factors.

**With the endorsement of Vision 2026, tourism stakeholders and partners have committed to transition through recovery, and transform into a better, more resilient sector that will thrive. This document outlines the three phases of this path:**

1. A short-term strategy in 2022-2023 that **transitions** tourism to a more solid footing, building capacity to grow visitation to pre-2020 levels;
2. A comprehensive medium-to-long-term strategy for 2024-2026 that **transforms** tourism on a sustainable path of consistent and responsible annual visitation, spending and employment growth; and
3. A vision for a regenerative tourism leadership approach that **thrives** by constantly monitoring and adapting to the dynamic and ever-changing global tourism environment.

There are three **Strategic Priorities** threaded throughout Vision 2026 that serve as a lens through which tourism development decisions will be made, which are:

1. Leverage Newfoundland and Labrador's Tourism Brand
2. Deliver on the Brand Promise throughout the Visitor Journey
3. Support Competitiveness Drivers

### 1. LEVERAGE NEWFOUNDLAND AND LABRADOR'S TOURISM BRAND

Making every effort to bring Newfoundland and Labrador's special tourism brand to life is a strategic focus around which tourism stakeholders have rallied through the creation of Vision 2026. Embodying the brand in tourism development decisions will ensure that this powerful asset endures for generations to come and energizes the province's full transformation into a thriving tourism destination.

### 2. DELIVER ON THE BRAND PROMISE THROUGHOUT THE VISITOR JOURNEY

Visitors, whether they are residents or non-residents, travelling for leisure, business or

another reason, are at the centre of tourism's success. It will be important to use every opportunity to accelerate responsible growth by being responsive to visitors' needs. Throughout the implementation of the transition and transformation action plans, focus will be on delivering high quality experiences that reflect the province's special brand along all touch points on the visitor journey.

### 3. SUPPORT COMPETITIVENESS DRIVERS

There are important drivers of tourism competitiveness that must be effectively resourced and managed. These drivers are access and transportation, research, marketing, product, people, technology and leadership. Competitiveness drivers will energize the transition to pre-2020 visitation and tourism spending levels. These drivers will further power the collaboration and transformation in leadership excellence to drive growth to new levels by 2026 and beyond.





Vision 2026 establishes a regenerative tourism approach through which tourism development will be guided. Newfoundland and Labrador's regenerative tourism approach strives to create an ecosystem of innovation, collaboration and adaptation that energizes strong economic growth, thriving operations, sociocultural vibrancy, and healthy people and natural environment for generations to come. The approach draws on the United Nation's Sustainable Development Goals, which were developed as a blueprint and call to action for all nations to achieve a more sustainable future for the planet.

Newfoundland and Labrador's regenerative tourism approach ensures that stakeholders are constantly engaged in how the environment is evolving, understanding how changes impact the vision and environment, and implementing the adaptive strategies and tactics needed to responsibly support the sector. Decision-making is informed, efficient and evidence-based, and provides the structure for tourism to remain highly competitive. Leading decision making in this way creates a living ecosystem that is always regenerating.



## There are **Eight Pillars** in Newfoundland and Labrador's Vision 2026.

**PILLAR 1** – Tourism Policy and Recognition

**PILLAR 2** – Leadership and Governance

**PILLAR 3** – Economic Performance, Investment and Business Environment

**PILLAR 4** – Competitiveness

**PILLAR 5** – Employment

**PILLAR 6** – Diversity, Inclusion and Well-being

**PILLAR 7** – Sustainability of Natural and Cultural Environment

**PILLAR 8** – Resiliency of Tourism Operations

Each of the eight pillars represent a specific and critical success factor in transitioning the tourism industry through its recovery, transforming it into a thriving tourism destination. For each pillar, objectives are provided. Actions have been developed and are provided in Annex A – Strategic Action Plan.



SECTION I  
Introduction

Newfoundland and Labrador's tourism partners collaborated through an innovative private-public leadership model to implement the 10-year tourism growth strategy, **Uncommon Potential: A Vision for Newfoundland and Labrador Tourism (Vision 2020)**, which helped grow tourism to reach \$1.2 billion in annual tourism spending and 20,000 jobs in the tourism industry. Now, this partnership has collaborated once again to lay out a new vision for tourism, one that transitions the tourism sector through its recovery to transform Newfoundland and Labrador into a thriving tourism destination.

## Before 2020, tourism in Newfoundland and Labrador had grown to record levels of spending by resident and non-resident travellers.

In early 2020, travel and tourism took a devastating turn with the Covid-19 pandemic, which resulted in a prolonged period of restricted travel and tourism, the impact of which is still being felt deeply.

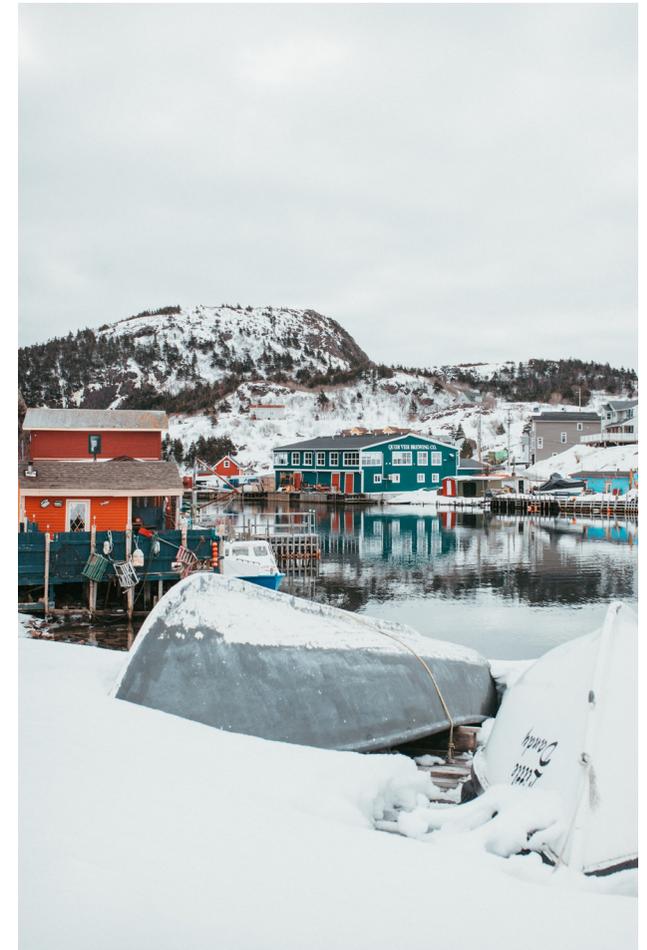
As a result of the pandemic, tourism has seen drastic changes. Aside from substantial global

social change, there has also been a shift in the economic environment, traveller values, and travel behaviour. The tourism industry itself has been impacted by the challenging financial pressures and their impact on all aspects of operations. Despite recovery programs from the federal and provincial governments, businesses continue to be financially stretched. Capacity constraints exist in transportation, access to supplies and services, business financial liquidity, workforce, and other fundamental building blocks that impact the industry's competitiveness and resiliency.

Through it all, the tourism sector has remained hopeful of better days. There are many reasons to be optimistic. With Newfoundland and Labrador's unique selling proposition aligned with changing travel values, behaviours, and preferences, the province is strongly positioned to responsibly grow visitation and tourism spending.

The pandemic has also led to a shift in perceptions of tourism and travel. Locals discovered how much there is to see and experience in Newfoundland and Labrador and gained a new appreciation for how important travel is in their lives and for their well-being. Perceptions about tourism's importance as an economic contributor and employer, and for what it adds to create

healthy communities and natural environments, were heightened in communities and at all levels of government. The tourism industry was also recognized for its contribution to supporting a vibrant culture and as a platform for arts, cultural and creative industries.





The pandemic gave tourism leaders across the province time to reflect on the challenges and opportunities the industry will face in its recovery and the solid foundation required to effectively navigate within a global tourism industry that will continue to be impacted by major changes. It was agreed that a renewed approach is required to guide all stakeholders through the realities and dynamics of a changed global tourism landscape. Over the past two years, Newfoundland and Labrador's industry and partners banded together to learn from each other and support one another. Through this collaboration, Vision 2026 was born, and will be the catalyst for the industry's ascent to new levels of sustainable and regenerative tourism development and success.



Newfoundland and Labrador's powerful tourism brand, successful marketing campaigns, rich, authentic local experiences and warm, welcoming people that connect deeply with visitors, provide the base upon which the industry is rebuilding.

This document lays out a holistic strategy that not only enhances the industry's competitiveness

but also identifies a regenerative tourism leadership framework. It is the blueprint for a dynamic provincial tourism ecosystem that is constantly evolving in the face of challenging market and environmental factors.

A dynamic sector requires a plan that adapts as the business environment evolves, which means the strategy must evolve as well.

This private-public partnership will support efforts to be a thriving, regenerative tourism destination that not only delivers high-quality, authentic, unforgettable experiences to visitors, but also responsibly utilizes resources to contribute to the wealth and well-being of people and places in Newfoundland and Labrador.

## Vision 2026 Development Process

Having successfully partnered to implement the 10-year tourism growth strategy **Vision 2020**, the Newfoundland and Labrador Tourism Board, a private-public partnership board, initiated a new vision and strategy development process in October 2019. At the outset, the Tourism Board determined the parameters and process for creating the new tourism vision, building on the work undertaken by Newfoundland and Labrador Tourism Board partners and stakeholders in the implementation of Vision 2020.

In June 2020, the Tourism Board awarded the vision development contract to BRAIN TRUST, a consulting agency, which initiated the visioning process in October 2020 with a redefined work plan given the ever-evolving circumstances of the pandemic. Over the course of two years, the consultant helped lead an extensive literature review, key informant discovery interviews and vision consultation sessions throughout the province to gain insight and validation for the development of the new vision and strategy.





Through the process, the consultant completed over 45 interviews and discovery sessions with key tourism operators, stakeholders and organizations.

The consultant, in partnership with Hospitality Newfoundland and Labrador and the five destination management organizations (DMOs), also led two rounds of regional virtual vision consultation sessions for a total of ten sessions. These sessions were broadly communicated to tourism stakeholders and other interested individuals, including municipal councils and the general public. The first round of consultations

focused on providing an overview of the development process. The second round provided an overview of the areas of focus, planning context, and strategic priorities for the vision and strategy. In addition, Hospitality Newfoundland and Labrador launched an online feedback portal after each session, communicating the link to all participants following their respective session. Through the portal, stakeholders provided feedback on the content presented in the sessions, which contributed to the vision and strategy. Finally, at the 2022 Hospitality Newfoundland and Labrador Tourism Conference held in April 2022, The Department of Tourism, Culture,

Arts and Recreation presented a comprehensive overview of the draft vision and strategy, which was widely accepted and supported.

Throughout the development of Vision 2026, the Tourism Board guided the process and collaborated regularly with the Premier's Advisory Council on Tourism to gain insight from key informants. The result of this robust consultation and engagement approach is Vision 2026, which has been created to reflect the priorities, themes and aspirations of the tourism industry.

# Background

## GLOBAL TOURISM

As a result of the pandemic, tourism continues to be one of the hardest-hit sectors globally, and industry experts predict it will be the sector that takes the longest to recover. Worldwide, international tourist arrivals hit record levels of 1.4 billion in 2019. In 2020, international travel arrivals dropped by 74 per cent compared to 2019 due to travel restrictions and socioeconomic challenges, representing an estimated loss of \$1.3 trillion (USD) in export revenues and around 120 million direct jobs. While some regions experienced a modest recovery in 2021, international arrivals were still 73 per cent behind 2019.<sup>1</sup> In 2022, international departures are expected to reach 68 per cent of the pre-pandemic levels globally and improve to 82 per cent in 2023 and 97 per cent in 2024, before making a full recovery by 2025 at 101 per cent of 2019 levels, with a projected 1.5 billion international departures.<sup>2</sup>

<sup>1</sup> UNWTO Tourism Dashboard

<sup>2</sup> GlobalData. May 13, 2022



## TOURISM IN CANADA

Canada's border remained closed to non-essential travel for much of 2021, with borders opening to travellers from the United States in early August and international travel in early September. Canada welcomed 3.1 million international overnight arrivals in 2021, up slightly from the 3.0 million recorded in 2020 but down 86 per cent from 2019 levels.<sup>3</sup>

As in 2020, tourism activity in Canada continued to be largely driven by the domestic market in 2021. While accounting for approximately 78 per cent of total tourism spending in 2019, domestic tourism accounted for 93 per cent of tourism spending in 2020, highlighting the impact of border closures on international visitation and spending.<sup>4</sup> Overall tourism spending increased 4 per cent in 2021, following a 49 per cent decline in 2020, with domestic spending increasing 5 per cent and spending by international visitors declining just over 2 per cent despite strong gains in the last half of the year. Tourism gross domestic product (GDP) rose 5 per cent annually, while employment attributable to tourism increased 1.5 per cent, with food and beverage and accommodation services being the largest growth contributors.<sup>5</sup>

<sup>3</sup> Destination Canada, 2021 Overnight Arrivals at a Glance Infographic

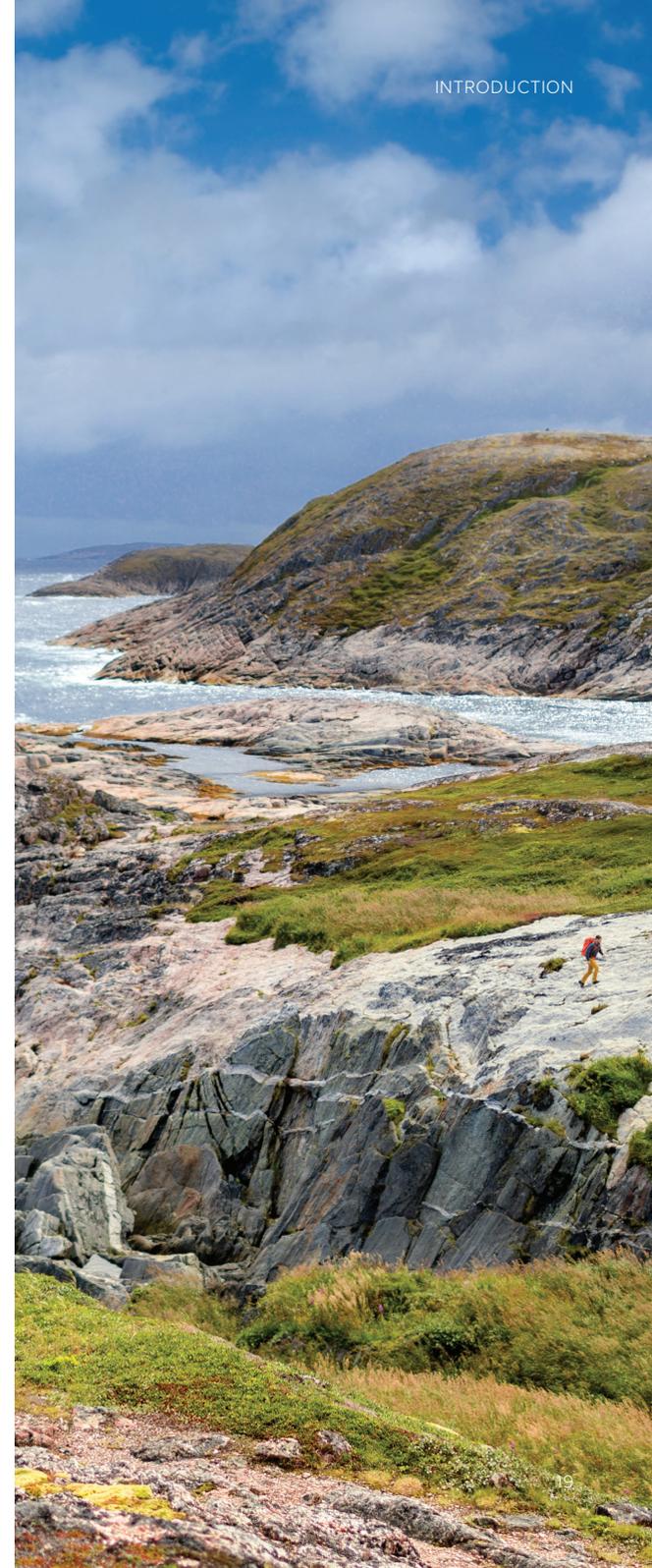
<sup>4</sup> Statistics Canada, National Tourism Indicators, Fourth Quarter 2020

<sup>5</sup> Statistics Canada, National Tourism Indicators, Fourth Quarter 2021

## TOURISM IN NEWFOUNDLAND AND LABRADOR

For nearly a decade, Newfoundland and Labrador consistently welcomed more than half a million non-resident visitors, peaking in 2017 (Canada 150 celebrations) at +553,000 and reaching +530,000 visitors in 2019. Since 2011, resident and non-resident tourism spending has consistently reached \$1 billion or more. Tourism spending in 2019 is estimated at \$1.2 billion, including resident spending of \$657 million and non-resident spending of \$550 million.

As in other jurisdictions, non-essential travel was discouraged starting in March 2020 due to the pandemic, with most travel prohibited to this province until July 2021. In addition, Canadian borders were closed to non-essential travel until the second half of 2021. As a result, visitation to the province nearly collapsed in 2020, with the number of non-resident air and automobile visitors travelling to the province estimated at nearly 116,000, a decrease of 76 per cent compared to 2019. Total in-province expenditures by non-residents were estimated at \$130.3 million, a decrease of 76 per cent compared to 2019.



## With the province and Canada opening to non-essential travel in the second half of 2021, non-resident travel showed strong signs of recovery.

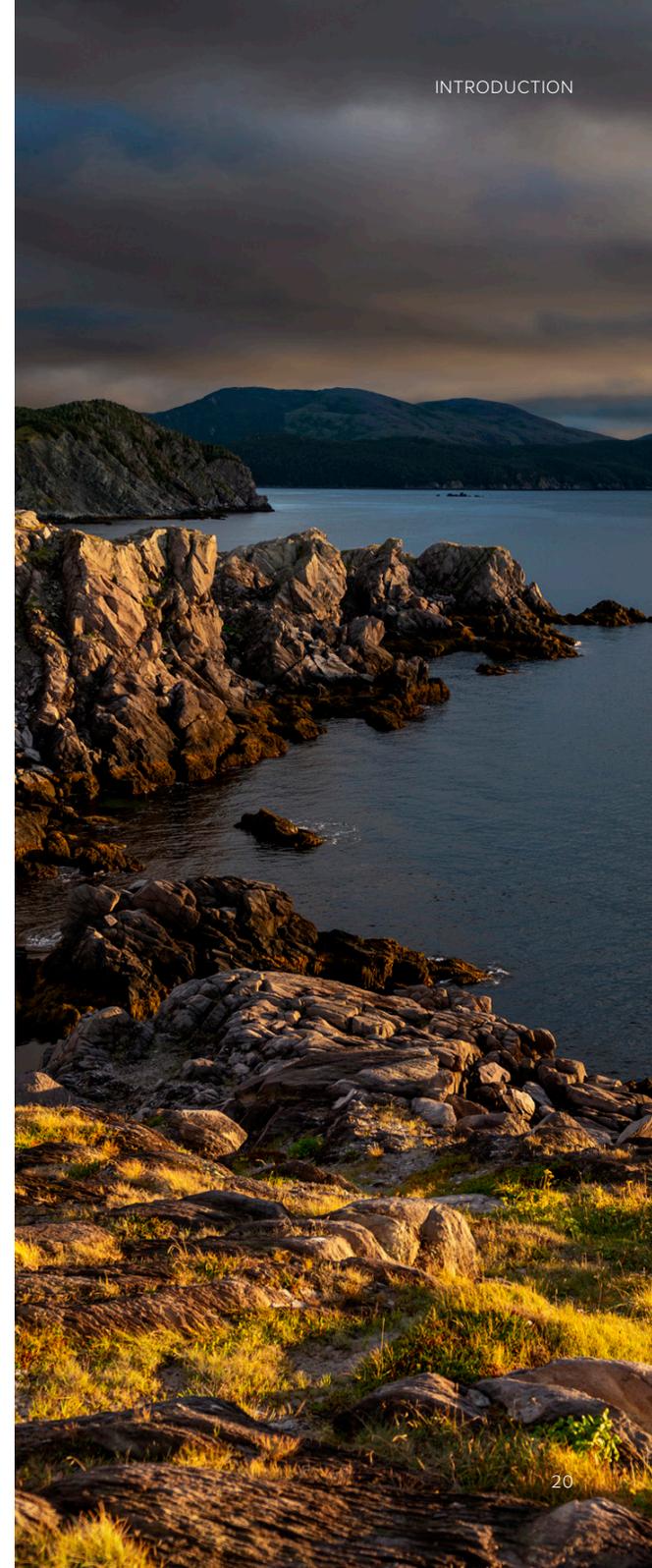
The number of non-resident visitors reached over 181,000 in 2021, a 57 per cent increase compared to 2020 but still 62 per cent below pre-pandemic levels. Auto visits were 68 per cent above 2020 levels but remained 31 per cent below those recorded in 2019, and while visits by air (116,600) increased 52 per cent over 2020, they remained 69 per cent lower than in 2019.

From July 2021, when the province re-opened to the rest of Canada, to the end of December 2021, visitation increased 152 per cent relative to July to December 2020. As well, for each month between September and December 2021, Newfoundland and Labrador saw a higher number of non-resident auto visitors than during the respective months in 2019. Visitation in December was 256 per cent above levels recorded in December 2020, marking significant year over year growth. Air visitation was also strong in Decem-

ber, up 354 per cent over December 2020, but it remained well below December 2019 levels.

Other performance indicators also moved in a positive direction in 2021. The licenced accommodations sector continued to see improvements over 2020 levels, with room nights sold up 49 per cent and total room revenue up 58 per cent over the same period in 2020. Despite these significant improvements, sector indicators remained below pre-pandemic levels to close out the year.

Marine Atlantic ferry passenger movements (both directions) reached 221,596 in 2021, an increase of 48 per cent compared to 2020 and passenger-related vehicle movements increased 57 per cent during the same period. Airport activity (boarding and deplaning passenger movements) for St. John's, Gander, Deer Lake, Stephenville, St. Anthony, Goose Bay and Wabush reached 824,698 passenger movements in 2021, an increase of 32 per cent compared to 2020 but still 63 per cent below 2019. Inbound non-stop seat capacity to the province (seven major airports) increased 5 per cent for the January to December 2021 period compared to the same period in 2020 (462,737 seats versus 440,058 seats in 2020).



In both 2020 and 2021, residents were essentially the main source of tourism activity in the province. With very low levels of Covid-19 cases in the province, residents were comfortable and confident travelling in their home province. Despite high levels of travel activity, residents' trips and spending were significantly impacted by the pandemic. It is estimated that resident spending decreased more than 50 per cent in both 2020 and 2021 compared to 2019, reaching an estimated \$300-\$400 million.



## TRAVEL OUTLOOK

As the Newfoundland and Labrador tourism industry sets out on its new strategic path, the impacts of the pandemic will continue to be felt and affect every facet of the tourism ecosystem. Although 2021 and 2022 have shown that tourism is well on its way to recovery, it remains fragile. Challenges with air access, the threat of new and more contagious variants, reduced travel confidence and a challenging economic environment will put additional pressure on the recovery of global tourism.

International travel demand will likely remain suppressed. However, the outlook for domestic travel remains positive as domestic travel will continue to drive tourism recovery in Canada into 2023. Significant increases in Canadians' travel intent in the next 12 months, both intra- and inter-provincially, lower demand for international travel, increased levels of comfort with travelling in general, and with using all forms of travel-related transportation options bode well for more travel activity in the near term. Destination Canada's Global Tourism Watch (October 2021) reported that signs of pent-up demand exist, as nearly two-thirds of Canadians miss travel and cannot wait to travel again. Spending on travel was reported as the top spending priority ahead

of longer-term savings, paying down debt and home renovations. Offsetting factors include travel costs, health risks, and high gas prices, which have been identified as the top perceived barriers to travelling within Canada.

Due to the dynamic nature of travel demand during the pandemic as well as continued recovery depending on so many factors, tourism will continue to see many challenges for some time to come. However, tourism operators in this province have shown a high level of creativity and resilience and adapted well to face the challenges of the pandemic. Newfoundland and Labrador's tourism sector benefitted from high levels of resident travel with the re-opening of the province to non-essential travel in 2021. This activity provided tourism businesses a much-needed boost from the loss of non-resident leisure visitors. The lessons learned over the past two years and the prospect of "building back better" present tourism in Newfoundland and Labrador with a unique opportunity to build the foundation to achieve the objectives laid out in this strategy.

# The Tourism Environment

The start of the pandemic in early 2020 led to a virtual stop of travel activity across the globe, with all non-essential travel strongly discouraged or even prohibited, and many jurisdictions closing their borders to visitors. With the travel restrictions easing significantly since early 2022, people are once again eager to travel, with pent-up demand driving tourism's recovery. Given the economic impact the pandemic has had on consumers, and lingering repercussions in the form of access capacity and rising food, consumable and fuel prices, the immediate term will not only focus on who is comfortable to travel, but also who will have the financial means to travel.

As a result of prolonged shutdowns and the impact of public health restrictions on global travel and tourism, competition among tourism destinations throughout the world has become more intense. Tourism destinations are fiercely competing for a share of domestic and international markets to drive their recovery and future growth.



Destination Canada’s report, **Tourism’s Big Shift**, identified a number of key shifts and challenges that will impact the tourism industry coming out of the pandemic, including a lack of access and reduced transport connectivity, labour and skills shortage, higher travel costs associated with high consumer demand and reduced supply and capacity, reduced business travel and events, product degradation, reduced access to capital and limited liquidity, and the shift in capacity and role of destination management organizations.<sup>7</sup>

In terms of market trends arising post-pandemic, Destination Canada predicts the industry will see more frictionless travel supported by enhanced technology, more domestic travel as some travellers remain uneasy about travel far from home, and a shift to more responsible travel with a socio-environmental focus. They also predict a greater interest in the well-being of communities and residents in destinations and less focus on visitation growth as the main goal of the tourism industry. A renewed interest in Indigenous tourism, outdoors and nature-based destinations, health and well-being tourism, an increase in affluent and retiree travel, and opportunities to work remotely are all seen as key tourism shifts to watch in 2022 and beyond.



The report presented industry and market trends equally crucial to recovery, as noted below.

Industry Trends	Market Trends
Lack of Access & Reduced Connectivity Labour & Skills Shortage Higher Costs Reduced Business Travel Reduced Events Reduced Access to Capital Limited Liquidity Product Degradation A Shift in Capacity & Role of Destination Marketing/Management Organizations	Frictionless Travel Domestic Travel Responsible Travel Ascendance of Communities Indigenous Connection Wild for Wilderness Growing Health & Wellbeing Affluent Travel Boom Remote Work & Resident Tourism Great Resignation & Retirement

<sup>7</sup> Destination Canada’s Tourism’s Big Shift: Key Trends Shaping the Future of Canada’s Tourism Industry Report (Nov. 2021)

## INDUSTRY CONSTRAINTS

Newfoundland and Labrador is facing several constraints that will impact tourism in this province, including: reduced air access, increased cost to travel and affordability of travelling here, increased competition, availability of and access to labour supply, increased cost of operations, limited financial capacity for reinvestment and seasonality realities.

Other types of travel from which Newfoundland and Labrador has benefitted in the past, including organized group tours/travel trade, meetings and conventions, and business and cruise travel, will take longer to recover resulting in continued losses for the province's tourism sector.

In 2020 and 2021, tourism in Newfoundland and Labrador was driven to a large extent by resident travellers. Research has shown that the province will continue to benefit from the travel momentum that has been built among residents over the past two years. As destinations across Canada and the rest of the world continue to ease travel restrictions, Newfoundland and Labrador residents will soon start to travel to these destinations instead of in their home province. Understanding residents' travel behaviours and their sense of value is key to

adapting offers to invite locals to continue travelling in-province, and particularly important for addressing season extension efforts.

## TOURISM BRAND AND MARKETING

Domestic travel will fuel short-term growth. This is good news for Newfoundland and Labrador, as this market has always been key to the province's tourism success, with more than 80 per cent of visitors arriving from within Canada. This market continues to show high levels of travel interest and intent within the next three years.

The greatest opportunity continues to lie in the 'creativity' positioning and supporting the creative strategy and execution, which romances, reflects and expresses the province's personality. Marketing and advertising campaigns have put Newfoundland and Labrador higher than ever on travellers' radars as being a distinctive destination and it has created exceptional and valuable 'buzz' among the province's biggest opportunity markets. More importantly, it evokes a rich emotional response and desire to visit this naturally exotic and unexpectedly different place.



## TARGET MARKETS

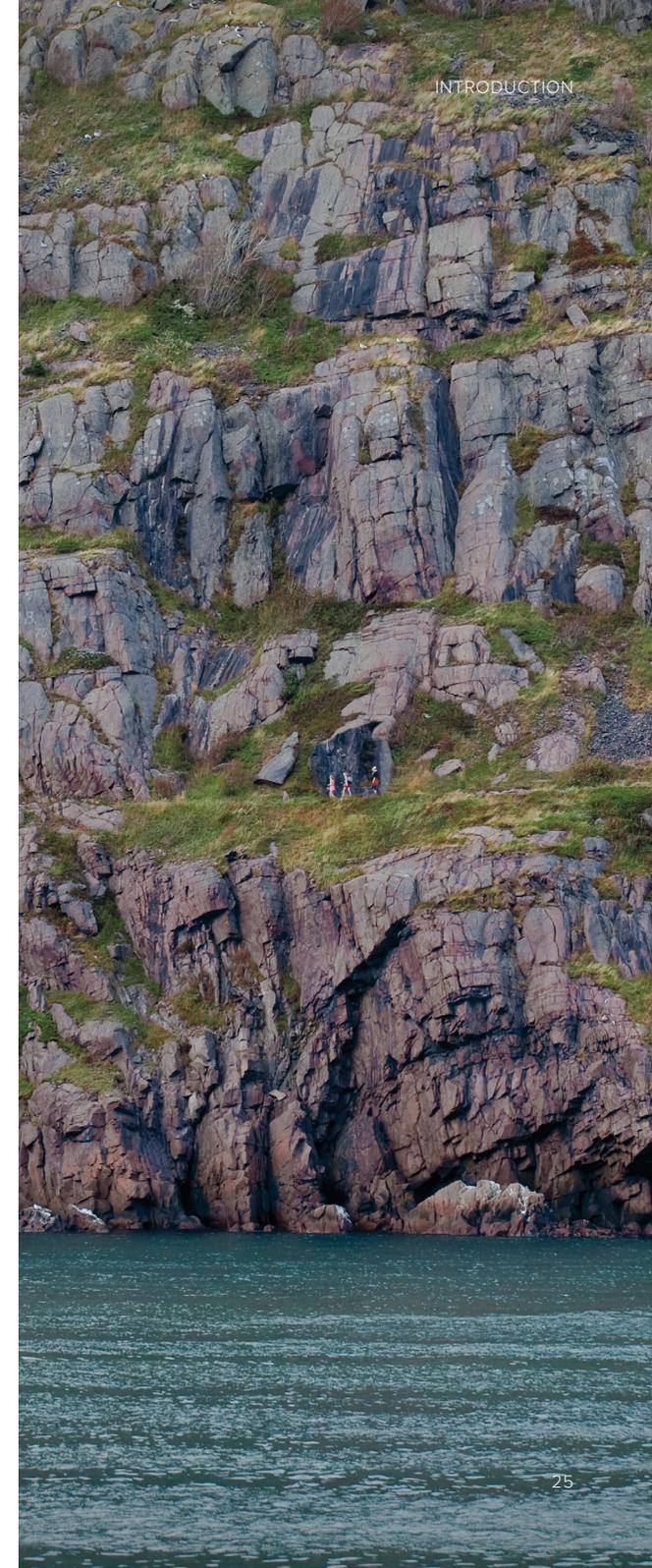
Tourism stakeholders have access to in-depth research about the province's key target markets and traveller types, including the types of experiences these travellers are seeking and how they want to travel. The priority non-resident target audience is made up of high-yield, experiential travellers; a broad leisure market, they seek out sightseeing and soft adventure experiences, from nature viewing to cultural experiences, to hiking, birding and whale watching. Newfoundland and Labrador continues to focus resources on target markets and audiences that represent the best opportunity to attract the greatest number of high-value travellers and produce the highest return on investment for the tourism industry. It will be important throughout the sector's recovery to understand how traveller values, preferences and behaviour have changed and how marketing strategies need to adapt to different traveller motivations.

## EXPERIENCES

Now more than ever, travellers are seeking wide-open spaces and prefer nature and outdoor experiences, choosing quality over quantity, opting for longer stays over frequent shorter trips, travelling in the off-season, using enhanced technology for frictionless travel planning and booking, and paying more for visiting less crowded destinations. Having built a brand that offers authentic experiences and the story of people, place and culture, Newfoundland and Labrador is well known for these attributes. Known for being a place to experience something different, the province's vibrant culture, vast beautiful natural environment and warm, welcoming people are already in place to support tourism's recovery and future growth.

## QUALITY

To be competitive as a high value destination also means making a commitment to quality and consistency in delivering on the brand promise in every single encounter with travellers. Elevating the level of quality and market-readiness along all touchpoints of the visitor journey is necessary to ensure the province's brand supports a high-quality value proposition and sustains responsible and strong visitation from high value traveller markets.





### LEADERSHIP AND COLLABORATION

Newfoundland and Labrador's tourism sector consists of many diverse stakeholders. All these stakeholders are important to enhancing the province's competitiveness as a tourism destination. With the foundation of private-public leadership collaboration through the Newfoundland and Labrador Tourism Board, tourism stakeholders are energized to accelerate growth over the next five years and build resiliency in the industry. It will be important to evolve the Newfoundland and Labrador Tourism Board leadership structure to adapt to current needs and for the future success of the industry.

### SOCIAL VALUES

Travellers are shifting increasingly to travelling more responsibly with a socio-environmental focus. Travellers are showing a greater interest in cultural understanding and the well-being of communities and locals in the destinations they visit. Consumers are now more likely to pursue authentic experiences, demand personalized travel offerings, blend business and leisure travel, and be more conscious of their overall impact on the environment. The pandemic has accelerated consumers' focus on environmental protection and commitment to sustainability. It has stimulated an increased desire for equality and equity, and an increased demand for brands protecting local culture and following a keen sense of community care, which are key principles of the United Nations' Sustainable Development Goals.

### DIVERSITY AND INCLUSION

Newfoundland and Labrador is recognized for warm, welcoming and hospitable people. Building on this to strengthen diversity and inclusivity will make the industry more resilient. It is important for tourism to be a responsible sector that builds connections with locals, communities, and cultures and supports immigration opportunities. Efforts to support and promote diversity, inclusion and accessibility will enable tourism experiences

to embody Newfoundland and Labrador's vibrant and welcoming brand.

### BUSINESS SECTORS

The tourism industry is a prime strategic partner of many other sectors in Newfoundland and Labrador. Arts and cultural industries as well as agriculture, fisheries, and food and beverage manufacturers are key suppliers and experience providers. Tourism is well positioned having established partnerships with these sectors that can be advanced even further to drive growth for all.

### PROVINCIAL ECONOMIC AND SOCIAL ENVIRONMENT

Provincial economic and social priorities, such as implementing the Renewable Energy Plan, achieving net zero by 2050, implementing the Climate Change Action Plan, Health Accord NL and achieving active, healthy living goals, present opportunities for tourism. Ensuring tourism's alignment with broader provincial goals will energize sustainable tourism priorities, grow dynamic employment opportunities, fuel business investment and entrepreneurship, drive innovation and fortify Newfoundland and Labrador's brand and reputation as a place to belong like no other in the world.

# A Regenerative Tourism Approach

Regenerative tourism guides and supports tourism development with equal focus on economics and the well-being of people and places as a means for measuring success.

**Through this lens, tourism becomes a tool that helps support communities and their way of life and adds economic, sociocultural and environmental value by:**

- 1.** Ensuring travel and tourism delivers a net positive benefit to people, places, and nature and that it supports the long-term renewal and flourishing of socio-ecological systems.
- 2.** Shifting away from the traditional approach where tourism is layered atop of communities and nature. Instead, tourism is co-designed with and for communities and nature from the bottom up. In the process, tourism operations, locals, communities and governments benefit by building deeper connections and respecting the special places in which tourism is created.



**3. Adopting a whole systems approach to tourism planning and development where the 'give back' is more than the 'take from' a destination or place.**

Competitive destinations are creating well-balanced tourism and travel recovery strategies that effectively navigate through the build-up of global tourism. This ensures that as visitation levels grow back, sector capacity grows responsibly with it, enabling the industry to deliver a consistently high level of quality in visitor experiences while growing the sector back to a newly defined and sustainable footing.

## The challenges of the pandemic present an opportunity to reinvigorate the provincial tourism ecosystem.

There are many ways to accomplish this. For example, by making strategic improvements to the private-public leadership model that governs the sector, gaining a comprehensive understanding of the gaps and opportunities in the tourism ecosystem, focusing efforts on leveraging the province's competitive advantages and fixing



the parts that are broken or neglected, tourism leaders will systematically and holistically build back on a new foundation that is more resilient, adaptable, and successful.

The experiences offered in Newfoundland and Labrador are authentically regenerative. Visitors often speak about how they are moved by the experiences that they have here. They are changed forever by the people they meet, the connections they make, the places they visit and the breathtaking beauty of the rugged land and sea they experience. These things all contribute to a powerful brand for Newfoundland and Labrador as a place for rejuvenation.

With Vision 2026, private and public stakeholders will not only grow tourism's contribution to the economy, but also to the sociocultural vibrancy and environmental well-being of the province. Achieving the vision will require time and effort. The path ahead will involve transitioning from the impacts of the pandemic and adopting new approaches to tourism development that will transform Newfoundland and Labrador's tourism industry into a higher gear, creating a thriving tourism destination.

**By leveraging the power of Newfoundland and Labrador's strong tourism brand of people, place and culture, tourism stakeholders will mobilize to implement:**

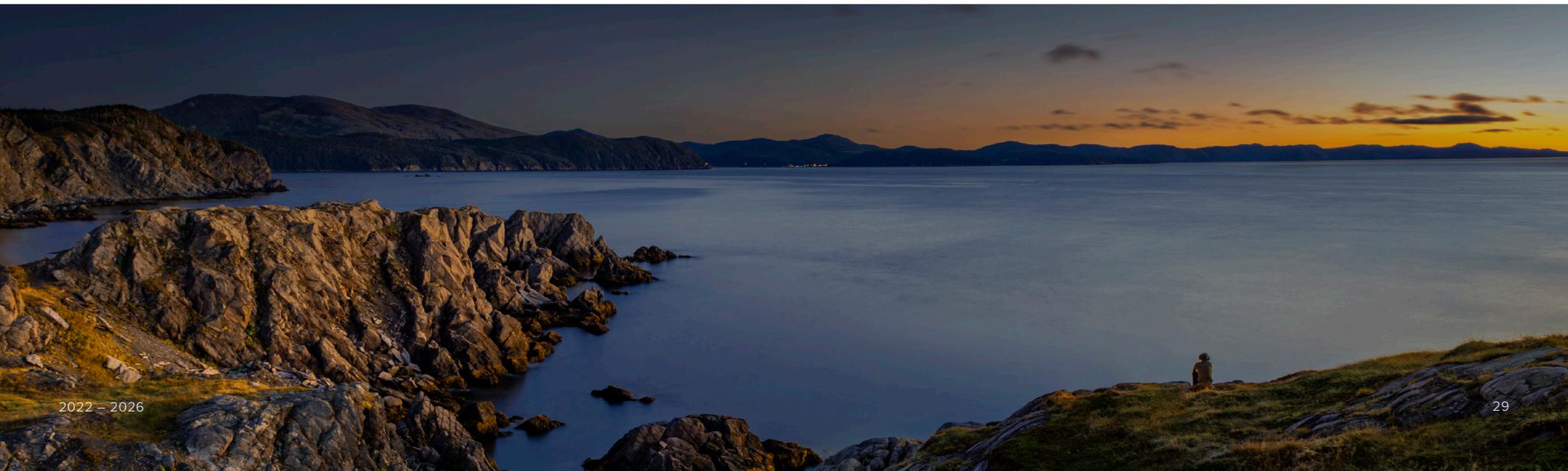
- 1.** A short-term strategy in 2022-2023 that **transitions** tourism to a more solid footing, building capacity to grow visitation to pre-2020 levels;
- 2.** A comprehensive medium-to-long-term strategy for 2024-2026 that **transforms** tourism on a sustainable path of consistent and responsible annual visitation, spending and employment growth; and

**3.** A vision for a regenerative tourism leadership approach that **thrives** by constantly monitoring and adapting to the dynamic and ever-changing global tourism environment.

This vision lays out a future of strong tourism growth, resilience and sustainability. It sets forth a vision for tourism that advances the industry to consistently contribute to economic prosperity in Newfoundland and Labrador and the well-being of its people and communities.

Tourism leaders have created a path forward that establishes a new framework and supporting strategy to guide tourism decisions and measures

the industry's true contribution to the province's well-being. The approach connects and aligns diverse private, non-profit and public stakeholders around the actions needed to realize the vision. It provides a path forward to strengthen the economic resiliency of the province by responsibly accelerating efforts to grow visitation, spending and employment, all while advancing broader sociocultural and environmental priorities for the benefit of people and communities.



A night scene with a starry sky, a wooden fence, and a path leading to a building on a hill. The sky is a deep blue with many stars. The fence is made of weathered wooden posts and horizontal rails, with thick rope tied around some of the posts. A gravel path leads from the foreground towards a building on a grassy hill in the distance. The building has a white roof and is partially obscured by the hill's vegetation.

SECTION II  
**Vision 2026**

# Vision

Newfoundland and Labrador is a thriving tourism destination that delivers authentic, unforgettable experiences to visitors.

# Mission Statement

To be a thriving tourism destination that contributes to strong economic performance, energizes sociocultural vibrancy and supports healthy people, communities and environments in Newfoundland and Labrador.



## Values

Creating deep, powerful **authentic experiences and connections** with visitors.

Being **warm and welcoming** and instilling a sense of **belonging**.

Celebrating and promoting the **creativity and diversity** of our people, place and culture.

Growing the **economic impact** of tourism while positively impacting the **well-being** of locals, communities and visitors.

## Goals

**The goals of Vision 2026 are reflected in outcomes, objectives, actions and initiatives.**

### ACCELERATE GROWTH

The tourism industry will mobilize private and public investment and partnerships to establish achievable balanced growth targets for economic performance and address key barriers to growth.

### BUILD RESILIENCE

The tourism industry will work to improve the resiliency of tourism operations and create a business environment in which tourism operations thrive.

### CREATE EXCEPTIONAL EXPERIENCES

The tourism industry will expand the number, quality, accessibility and market-readiness of tourism experiences that reflect brand pillars of people, place, and culture and celebrate the vibrancy, innovation, vitality, colour and creativity of Newfoundland and Labrador.

### DRIVE INNOVATION

The tourism industry will continue to adapt to the digital economy, encouraging innovation in overcoming challenges and creating new opportunities to meet economic, social and environmental objectives.

### EXPAND SEASONS

The tourism industry will focus efforts to extend seasons and collaborate on a holistic approach to build season extension capacity, resilience and visitation.

# Guiding Principles

**Guiding principles for regenerative tourism will help guide decisions for the implementation of Vision 2026.**

## BALANCED APPROACH

Tourism visitation should grow at the same pace as industry capacity to ensure high quality experiences and reduced impacts on locals and the environment.

## INTERCONNECTEDNESS

Tourism growth depends on the coordination and alignment of diverse private, non-profit and public stakeholders working together on a whole-of-destination approach and engagement with locals and communities.

## STRONG CIRCULATION

Tourism sustainability requires efforts to drive strong circulation in the visitor economy.

## CREATIVE, ADAPTIVE AND RESPONSIVE

Tourism requires a collaborative structure that understands the environment, utilizes diverse ideas, supports innovation and enables nimble adaptability as opportunities and challenges arise.

## WELCOMING AND INCLUSIVE

Tourism welcomes and connects with people from all backgrounds and cultures, striving to be inclusive and accessible.

## CONTINUOUS MONITORING AND IMPROVEMENT

Tourism requires effective and efficient monitoring and continuous improvement efforts.

# Strategic Priorities

**There are three strategic priorities that are threaded throughout Vision 2026, which serve as a lens through which tourism development decisions will be made. They are:**

- 1. Leverage Newfoundland and Labrador's Tourism Brand**
- 2. Deliver on the Brand Promise throughout the Visitor Journey**
- 3. Support Competitiveness Drivers**





## Leverage Newfoundland and Labrador's Tourism Brand

Travel is driven by a deep emotional motivation to experience new people, culture and places. Newfoundland and Labrador's tourism brand stands for creativity, as creativity is true to the DNA of this place and its people. It differentiates Newfoundland and Labrador and has become the province's strongest unique selling point.

**Creativity as the brand positioning is expressed and supported by three pillars:**

**PEOPLE** – The very real character of people, their attitude and way of life. Real genuine people – warm, friendly, welcoming, witty, humorous and fun loving. Even more powerfully shaped by an unrelenting and unforgiving environment, mastered through fierce independence, steeped in self-reliance, quiet pride and creative ingenuity.

**CULTURE** – This culture of rich history, heritage, music, art, language, architecture, folklore, traditions, values, and the vitality, colour and texture in everything that is created here. It links the past with the present and a vibrant future, expressed through all forms of art, creativity and innovation.

**NATURAL ENVIRONMENT** – This place of fierce beauty that lives by the sea. A rugged land with 20,000 miles of coastline, of coves, guts and bays, and rich icons of whales, wildlife and icebergs.

## Making every effort to bring Newfoundland and Labrador's special tourism brand to life is a strategic focus of Vision 2026.

Tourism stakeholders have rallied around this approach. Embodying the brand in tourism development decisions will ensure that this powerful asset endures for generations to come and energizes the province's full transformation into a thriving tourism destination.

Newfoundland and Labrador's brand personality personifies and brings to life, both visually and in attitude and language, the creativity of the province's people, culture and natural environment. It is a priority to authentically embody, protect and promote the province's special pillars of people, culture and place.

- Travellers are connected to the people of the province, who authentically embody welcoming hearts and friendly, grounded, creative personalities. Tourism will respect and honour the people of Newfoundland and Labrador – past, present and future – as the

owners of the brand, who share this beautiful nature with the world.

- Tourism will respect and honour the province's rich culture and heritage by sharing the stories of people, place and culture through all forms of art and expression.

- Tourism will respect and honour the natural environment by protecting and promoting the most important natural assets that contribute to a high quality of life and well-being, and that provide the stage on which exceptional, high value tourism experiences are built.

- Tourism will build a safe and welcoming destination for everyone, a place where everyone belongs.

# Deliver on the Brand Promise Throughout the Visitor Journey

Visitors – whether they are locals or non-residents travelling for leisure, business or another reason – are at the centre of tourism’s success. Hence, why tourism is called the visitor economy. It will be important to use every opportunity to accelerate growth by being responsive to visitors’ needs. Throughout the implementation of the transition and transformation action plans, focus will be on delivering high quality experiences that reflect the province’s special brand along all touchpoints on the visitor journey.

The first leg of the visitor journey is when Newfoundland and Labrador makes the brand promise about what a vacation in this province will be. This is usually long before their trip ever happens. When a visitor’s interest is sparked – and they move from interest stage to information gathering stage to planning and booking, it is important to ensure they have everything they are looking for and it is easy for them to plan. Most importantly, they need to be able to efficiently book the services and attractions they want for their trip. As the touchpoints on this planning journey are typically online or through

phone or email, it is important to be responsive, friendly, welcoming and as helpful as possible to their trip planning process.

The next leg of the visitor journey is when they arrive and travel around the province. The touchpoints for this leg include transportation, visitor services, accommodations, food, natural and cultural attractions, events, tours and experiences. Newfoundland and Labrador will be successful and sustainable over the long term if visitors can efficiently access the province and have experiences that reflect quality and authenticity.

The final leg of the journey is when the visitor returns home and reflects on their experiences with the people and places of Newfoundland and Labrador. Ideally, when visitors leave the province, they forever hold Newfoundland and Labrador in their hearts. They will share their vacation memories with family and friends, start to dream about their next vacation, and have many happy return trips. They may even think about business or other investment opportunities and possibly relocating here to live.





## Support Competitiveness Drivers

There are seven important drivers of tourism competitiveness that must be effectively resourced and managed, especially in the transition phase. Competitiveness drivers energize the transition to pre-2020 visitation and tourism spending levels. These drivers power collaboration and transformation in leadership excellence to further grow Newfoundland and Labrador's visitor economy to reach new levels of visitation and spending.

### ACCESS AND TRANSPORTATION

A competitive tourism destination requires efficient, affordable and reliable access. The tourism industry in the province has a collaborative partnership with transportation providers, such as airports, airlines and car rental agencies, reinforced over the past two years. Access by air, land and sea as well as in-province infrastructure, including telecommunications, are an integral part of the visitor journey. These factors have a direct impact on the quality and experiences visitors have in Newfoundland and Labrador and the ability to attract visitors to the province and to communities.

### RESEARCH

To deliver on the brand promise and understand the industry's capacity, constraints, performance and opportunities, research is a critical input. An effective research plan that provides the industry with continuous monitoring and provides data to adapt and make improvements will enable the sector to achieve its goals.

### MARKETING

The special combination of people, culture and natural environment gives Newfoundland and Labrador's tourism sector its unique selling proposition. Building on this reputation to create, cultivate and convert travel interest into increased visitation and tourism spending will require effective marketing and sales strategies that are driven by evidence-based research. Collaborative and aligned marketing activities among tourism partners and individual operators throughout the province enable the industry to leverage collective investment and resources. These efforts must focus on all touchpoints of the visitor's path to purchase so that they move with ease from interest, to planning, to booking, to experiencing.

## PRODUCT

Personal and emotional connections and hands-on opportunities to explore culture and place create memories that travellers desire. As research and analysis reflects, the tourism experiences offered in Newfoundland and Labrador match and attract a high-value traveller. Attention must be given to effectively communicate the quality of products and experiences available, as visitors must make a concerted effort and pay a higher cost to visit. To support the tourism industry's recovery, it will be important to ensure that the authentic, quality attractions and experiences are market-ready and promoted, and that there are visitor infrastructure and services in the right locations to serve market demands and expectations. In addition, becoming a more resilient tourism destination will require season extension strategies that support the delivery of high-value natural and cultural assets that are available where possible throughout the year.

## PEOPLE

The people that work in the tourism industry, as owners, managers, and frontline service and experience providers, are the face of Newfoundland and Labrador's brand but so too are the locals that visitors encounter on their journey. People provide the experiences that

visitors have in the province. It is often said of Newfoundland and Labrador that visitors come as strangers but leave as friends. As a highly labour-intensive industry, tourism requires a stable workforce to drive growth and development and embody the province's brand. A thriving tourism destination requires skilled, knowledgeable employees, businesspeople, volunteers and leaders that have a commitment to quality and consistently deliver exceptional experiences.

## TECHNOLOGY

Technology continues to evolve and the tourism industry's adoption of the latest technologies continues to rise. Encouraging and supporting the adoption of technology in the tourism sector will help build resilience, promote better engagement with travellers along the path to purchase and allow for greater productivity and business efficiency in tourism operations. Technology can help deliver highly interactive and responsive experiences through all touchpoints of the visitor journey – from how visitors research and book travel, to how they navigate and find the experiences available in Newfoundland and Labrador. Technology is also a tool for the tourism industry to achieve greater productivity in operations.

## LEADERSHIP

Leaders in the many diverse tourism organizations, as well as stakeholders who contributed to the development of Vision 2026, represent an advantage for the province in achieving the vision, implementing the strategy and enhancing Newfoundland and Labrador's competitiveness in the global tourism marketplace. A tremendous amount of groundwork has been done over the past decade to establish the private-public leadership model. Making strategic enhancements and improvements to the leadership structure at this time will help the partnership to implement Vision 2026 more effectively and efficiently against the backdrop of the dynamic and competitive tourism landscape.

Alignment of strategies and action plans, the most significant opportunity available, will ensure the sector is focused in the right direction and advancing more quickly. Further aligning government and industry efforts, strengthening the leadership collaboration with even greater engagement, filling important gaps in leadership capacity and developing closer links with communities and regions will fortify the level of partnership required to become a thriving tourism destination.

# Regenerative Tourism Leadership Framework

Newfoundland and Labrador's tourism vision is not simply to build tourism back to where the industry was before 2020, but to renew and restore Newfoundland and Labrador as a thriving and responsible tourism destination. To achieve this vision, all tourism stakeholders must work together to create businesses and communities that sustainably utilize resources and connect economic goals to the well-being of people, places and culture.

Newfoundland and Labrador's regenerative tourism approach strives to create an ecosystem of innovation, collaboration and adaptation that energizes strong economic growth, resilient operations, sociocultural vibrancy and healthy people and natural environment for generations to come. The approach draws on the United Nation's Sustainable Development Goals, which were developed as a blueprint and call to action for all nations to achieve a more sustainable future for the planet. Newfoundland and Labrador's regenerative tourism approach



ensures that stakeholders are constantly engaged and collaborating to observe how the environment is evolving, understand how changes impact the vision and implement the adaptations that are needed. Decision-making is informed, efficient, and evidence-based and provides the structure for tourism to remain highly competitive. Leading decision-making in this way creates a living ecosystem that is always regenerating.

All pillars for regenerative tourism should advance at the same time; however, decisions must be balanced, ensuring that leaders are mindful of the entire foundation. It requires all partners to clearly understand the vision, values, guiding principles, the steps forward and to be equipped with the resources needed to achieve progress towards goals.





## The Eight Strategic Pillars

**PILLAR 1** – Tourism Policy and Recognition

**PILLAR 2** – Leadership and Governance

**PILLAR 3** – Economic Performance, Investment and Business Environment

**PILLAR 4** – Competitiveness

**PILLAR 5** – Employment

**PILLAR 6** – Diversity, Inclusion and Well-being

**PILLAR 7** – Sustainability of Natural and Cultural Environment

**PILLAR 8** – Resiliency of Tourism Operations

### OVERVIEW

Each of the eight pillars represent a specific and critical success factor in transitioning the tourism industry through its recovery and transformation into a thriving tourism destination. For each pillar, objectives are provided. Actions have been developed for each and are provided in Annex A – Strategic Action Plan.

# Pillar 1

## Tourism Policy and Recognition

This pillar focuses on the overarching perception of tourism in the province and reinforcing that tourism is recognized as a force to achieve strong economic, sociocultural and environmental benefits. This ensures effective policy and investment to sustain growth in the industry.

### OUTCOMES

**Working to achieve the objectives of this pillar will result in the following:**

- The tourism industry is recognized as a provincial force to achieve strong economic performance, sociocultural vibrancy and environmental action.
- Tourism contributes to making Newfoundland and Labrador a great place to visit and a great place to belong.



## OBJECTIVES

The objectives of this pillar are as follows:

### 1.1 Strengthen the recognition of tourism as a force to achieve strong economic, sociocultural and environmental benefits.

While perceptions are improving, it is important for the tourism industry to improve not only the understanding of how it contributes to the economy and employment, but also how it contributes sociocultural and environmental benefits to the province. This will ensure that the many positive values of tourism are understood and tourism development investments, policy and regulatory action are supported.

### 1.2 Support a private-public provincial tourism vision and strategy that advances tourism growth.

Tourism requires a clear, well-researched and comprehensive provincial vision and strategy that threads together all the diverse parts in the ecosystem. Private and public stakeholders committing to Vision 2026 will help align the sector and drive progress.

### 1.3 Advance collaborative implementation and focus resources efficiently and effectively.

Strategies are only as powerful as their implementation efforts. Advancing efforts, while monitoring

and adapting plans based on results, requires private and public roles and responsibilities to be clear and resourced.

### 1.4 Implement an effective legislative and regulatory framework in priority areas.

The tourism industry is an economic sector that requires a foundation of effective legislation, where there is regular assessment of needs and analysis of more effective systems. Addressing priority regulatory barriers and issues will help build resilience.

### 1.5 Leverage support, investment and interest at municipal, Indigenous, provincial, federal and international levels.

There is a need to ensure that tourism receives support, interest, and investment from all levels of government and collaboratively builds on opportunities to attract new investment into the province and communities.

### 1.6. Increase local engagement and awareness of tourism’s contribution to the quality of life and well-being of communities.

Tourism should develop in a way that ensures the integrity of the way of life for locals. The beauty of tourism is that the lifestyle that locals hold so dear is the very fabric of the experiences that draw

visitors to Newfoundland and Labrador. Locals are tourism stakeholders and equally committed to preserving the special attributes of their communities. Success as a tourism destination depends on engagement from locals. For this reason, it is important that communities have a voice in tourism development and that the special natural and cultural essence of communities is protected and enhanced.



# Pillar 2

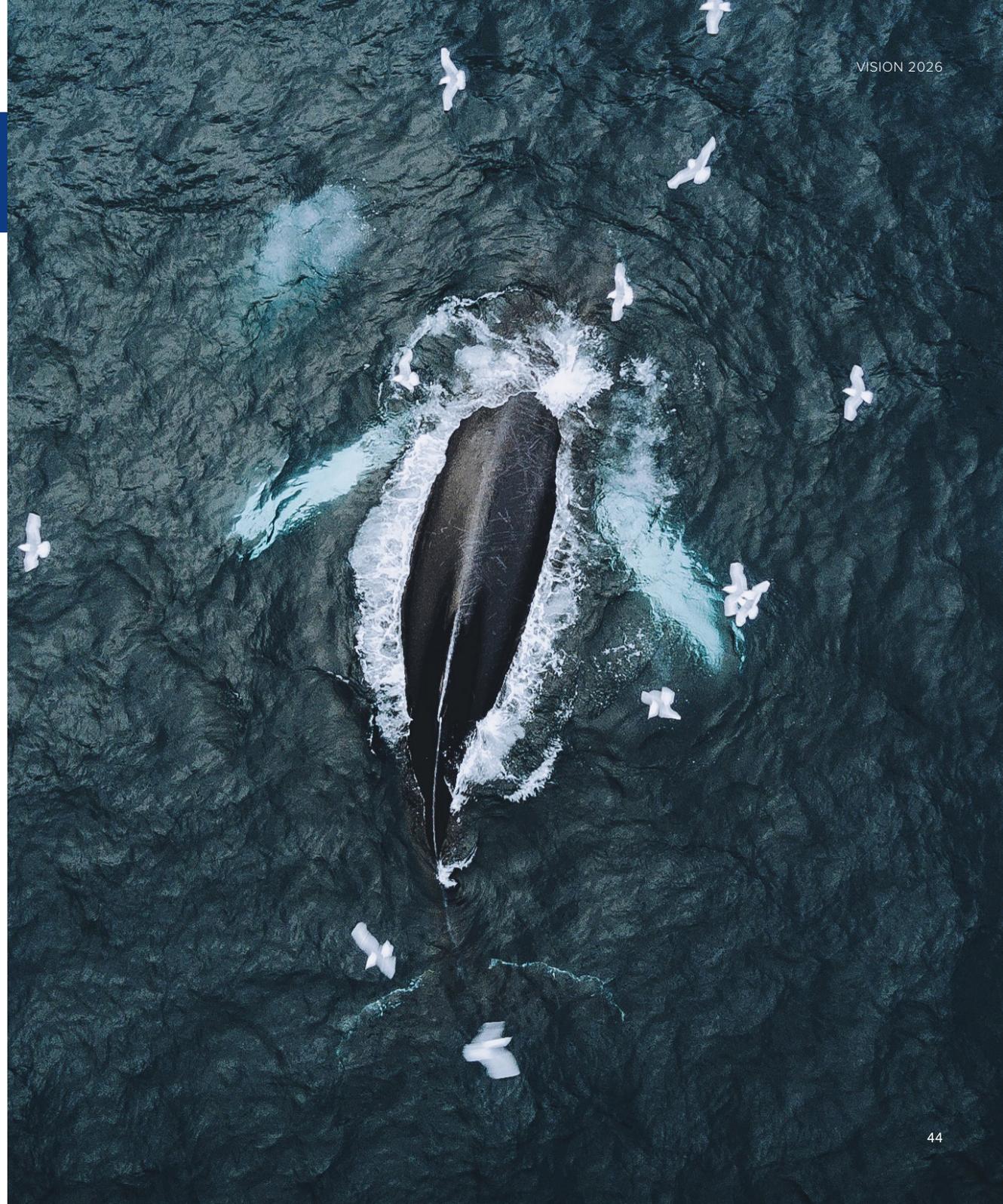
## Leadership and Governance

This pillar focuses on evolving the structure and governance for tourism leadership to effectively align around a whole-of-destination, regenerative tourism approach with diverse, interdependent tourism stakeholders grounded in Vision 2026. A new refined structure and governance model will provide the strategic and operational network to effectively plan and implement actions based on sound evidence-based and collaborative province-wide strategies.

### OUTCOMES

**Working to achieve the objectives of this pillar will result in the following:**

- The tourism industry's leadership structure and governance model provides a strategic and operational network to plan and implement evidenced-based strategies.



- Tourism's leadership, vision and priorities are aligned and energizing advancements in wealth and well-being for people, communities and businesses.

## OBJECTIVES

**The objectives of this pillar are as follows:**

### **2.1 Evolve tourism leadership structure and governance to effectively partner with diverse stakeholders to advance Vision 2026.**

An effective leadership structure for building a thriving tourism destination requires a partnership model approach. There are many private and public partners with diverse roles and responsibilities that must lead together as one efficient ecosystem for tourism in this province to thrive. This requires a strong leadership partnership structure where diverse leaders work together to advance aligned strategies as the business environment evolves.

### **2.2 Support alignment efforts that ensure strong collaboration to achieve goals and objectives.**

At its foundation, due to the volume and interconnectedness of diverse stakeholders, tourism requires a strong collaborative network to achieve its goals. When strengthened, partnerships among all tourism stakeholders – private, public,

non-profit at the local, regional, Indigenous, provincial, national and international levels – ensure substantial and sustainable growth. Addressing gaps in collaboration and communications will help the sector rebuild and recover by strengthening the collective force of multi-stakeholder partnerships that mobilize knowledge, expertise, technology and financial resources.

### **2.3 Advance efforts that encourage strong private sector engagement.**

The private sector is the economic foundation of the tourism industry and as such, requires an approach that brings together private enterprises to lead, support, create and implement Vision 2026. Strong private sector engagement in leadership and governance is essential to ensuring that the evolving strategies are reflective of the realities and priorities of commercial operations.

### **2.4 Enhance processes for stakeholder engagement with a diverse range of relevant stakeholders.**

The strategic leadership structure will require an effective and efficient operational model that brings the strategy to life through its active engagement with stakeholders. Stakeholder engagement should include processes for a diverse range of relevant voices, including non-profits,



other economic sectors, educational institutions and community leadership. The leadership model takes active steps to promote stakeholder involvement and public interest at every level.

**2.5 Improve local engagement and integrate local supply in tourism.**

Effective tourism development that achieves regenerative goals requires effective processes to involve locals and communities. Engaging locals and communities in tourism will help build experiences in their communities that locals can be proud of, invest in and support. Integrating local food, beverage, products and other local supply

chain opportunities will embody the brand and promote other sectors of the provincial economy.

**2.6 Support initiatives aimed at building tourism leadership capacity and engagement.**

Leaders, a diverse group of individuals who will help inform, guide and support the implementation of Vision 2026, are critical to its success. The ability to attract new leaders that drive forward-thinking strategies and use their unique knowledge and expertise will keep a steady flow of diverse ideas and sector intelligence in the leadership and governance model.



# Pillar 3

## Economic Performance, Investment and Business Environment

This pillar focuses on ensuring there is an accurate measure of tourism's economic contribution to the province through key performance measures to demonstrate its impact. Understanding how tourism operates and how public investment and policies impact tourism demand will help build the business environment that supports and attracts private sector investment in the province.

### OUTCOMES

**Working to achieve the objectives of this pillar will result in the following:**

- Thriving tourism operations enable the sector to achieve economic performance targets.
- Tourism grows its contribution to the economy of Newfoundland and Labrador, supporting investments in programs and services that enhance people's lives.



## OBJECTIVES

The objectives of this pillar are as follows:

### 3.1 Establish economic, sociocultural and environmental performance indicators that capture tourism’s contribution.

Understanding the importance of tourism for its contribution to economic prosperity and social well-being of the province is a priority. The development of key performance indicators that are regularly tracked and reported will help enable the measurement of the impact of tourism to the province’s wealth and well-being.

### 3.2 Enhance provincial tourism research and continuous monitoring activities.

Access to high-quality and timely research is a vital element of sound decision-making. Regularly and effectively communicating and sharing analyses and insights will ensure all stakeholders have relevant and timely information at their fingertips. Adequately reporting resident and non-resident, domestic and international data so that it guides effective decision-making is crucial. This requires a strong research structure that measures and monitors the performance of the sector, including employment.

### 3.3 Complete an economic impact analysis for tourism that can be used as a framework to regularly measure contribution.

An important measure to track and understand is the tourism industry’s economic impact. The industry’s economic impact contribution should be regularly measured and communicated, and include the economic impact of specific initiatives undertaken in the province, such as special events.

### 3.4 Maximize private and public investments by aligning strategies and implementation efforts towards Vision 2026 priorities.

Fundamental to the success of tourism is the level of investment from private and public stakeholders. Public investment helps create conditions in which private operators feel confident to make their own business investments. Public support for tourism and transportation infrastructure, such as natural and cultural attractions and access and transportation, create the environment that attracts private investment.

### 3.5 Support investment attraction initiatives.

It will be important to have healthy private sector investment to fill capacity gaps in attractions and services available to visitors. Attention will need to be paid to ensuring an understanding of where gaps exist because of the pandemic. These gaps

have a major impact on the quality of tourism experiences; investment attraction efforts will fill any identified gaps.

### 6. Ensure tourism industry impacts and opportunities are understood for trade potential.

As an export industry, it is important that tourism opportunities are considered in trade policy decisions. Efforts can be made to understand constraints in the supply chain to identify local business solutions and trade opportunities to ensure the sector can flourish.



# Pillar 4

## Competitiveness

This pillar focuses on enhancing competitiveness by building access and transportation capacity, implementing effective branding and marketing, and offering quality products and experiences that are reflective of market preferences. It also focuses on expanding the opportunities for tourism visitation throughout the year, beyond the peak summer season, and to build partnership opportunities that foster long-term resilience.

### OUTCOMES

**Working to achieve the objectives of this pillar will result in the following:**

- The tourism industry has efficient and affordable access, a competitive marketing strategy and year-round, high quality experiences that drive visitation and responsible growth.
- Tourism helps support infrastructure, experiences and systems that improve the quality of life and well-being of locals and communities.



## OBJECTIVES

**The objectives of this pillar are as follows:**

### 4.1 Implement initiatives that build our access capacity and increase affordability and efficiency of transportation and connectivity systems.

An efficient multi-modal transportation system supports a thriving travel and tourism industry. Of particular importance in Newfoundland and Labrador is air access from key geographic markets in Canada and internationally. Transportation systems, such as air access, roads, rental vehicles and taxi access, ferry access, and wayfinding, underpin the safe, accessible and efficient transport of locals and visitors. Access to and around the destination needs to be safe, efficient, affordable and easy to navigate. Access also means virtual connectivity through broadband and cellular service, which is essential to creating vibrant communities, advancing technology adoption, digitalization and responding to the needs of locals and visitors.

### 4.2. Invest in effective and focused tourism branding and marketing strategies in collaboration with the tourism industry.

A thriving tourism destination requires a strong established brand identity that is well-articulated and maintained. Marketing plans identify target markets and a collaborative and aligned framework

for communications is utilized that promotes private-public engagement in the planning and implementation of marketing strategies.

Barriers to fully implementing marketing plans are addressed efficiently and activities that monitor and make full use of new technologies inform implementation.

The "Path to Purchase" is the visitor's journey across various touchpoints before purchasing. Today, the idea of a linear path to purchase is no longer relevant. Instead, multichannel interaction now drives the overall customer experience, with shoppers exploring multiple offline and online touchpoints. This change is more significant today,

primarily because of the pandemic. The pandemic significantly stimulated customers' comfort with and use of online platforms.

### 4.3. Create exceptional experiences along all touchpoints of the visitor journey.

Tourism is about inviting visitors to come to communities, connect with locals and explore Newfoundland and Labrador's places and culture. To truly experience the province, visitors access products and experiences that tell the story and celebrate the unique, colourful, creative and poignant parts of who we are, how we live and how we have evolved through the generations.





Creating new and adapting existing experiences and product offerings is central to tourism’s continued recovery. Consumers are viewing travel through a new lens; they have an increased conscientiousness about their journey and how it impacts the communities they visit. Therefore, the types of experiences offered should align with a responsible and regenerative approach to experience development.

**4.4. Focus experience development on priority areas of arts and culture, culinary, Indigenous and nature experiences.**

Consistent with the provincial mandate to promote arts and cultural industries, the vibrancy and energy of these experiences are important to everyone in the tourism industry and the province. Creativity comes naturally in a place like Newfoundland and Labrador; it is spontaneous and fun. It makes the heart come alive. Focusing on these types of experiences will amplify the invitation for visitors to come to a place where inspiration can be found around every corner.

**4.5. Improve the quality and market-readiness of experiences along all touchpoints of the visitor journey.**

High-quality, authentic and market-ready experiences that are delivered throughout the entire visitor journey are paramount to achieving tourism goals. Products and experiences should be authentically reflective of Newfoundland and Labrador’s brand of welcome and hospitality. Experience development priorities are clear and supported with policy and investment. There is a need to embed a regenerative lens on product development in ensuring consistency in the quality and market-readiness of the experiences offered throughout the province.

**4.6. Advance efforts to establish year-round and seasonal tourism clusters.**

To build resiliency for all tourism stakeholders, there must be opportunities for tourism operations, communities and clusters to grow their seasons beyond the traditional peak summer months. Shoulder season and winter tourism opportunities should be explored, and capacity development support provided to create the environment for growing the number of year-round tourism offerings. Season extension efforts should include research, access, marketing and product partnership activities with relevant stakeholder groups.



# Pillar 5

## Employment

This pillar focuses on the importance of effective workforce planning, policies and collaborative approaches to improve worker attraction and retention. The tourism industry will strive to offer quality, meaningful work for varying expertise and experience levels, from frontline and management staff to business ownership.

### OUTCOMES

**Working to achieve the objectives of this pillar will result in the following:**

- The tourism industry is recognized for offering meaningful work of varying expertise and experience levels, from frontline to management to business ownership.
- Tourism supports dynamic career and business investment opportunities to people and communities in the province.



### **5.1. Implement effective workforce plan and policies.**

According to Tourism Human Resources Canada (THRC), tourism workforce issues did not begin with the pandemic, but it has amplified the problem. For this reason, Newfoundland and Labrador's tourism industry will have to work collaboratively, utilizing the power of national and international relationships and resources, to collectively identify viable solutions to address the labour challenges that exist.

Tourism is a labour-intensive industry that provides a wide range of work opportunities across a diverse set of interconnected travel and tourism operations. Varying levels of expertise and experience, including frontline, technical, managerial and executive levels are part of the job mix. As such, thoughtful workforce policies can impact the industry in supportive ways. Ensuring a strong stable workforce is available to support year-round growth in the industry requires comprehensive provincial workforce plans and actions carried out by multiple stakeholders at many levels. The success of tourism workforce efforts is supported by the reputation of tourism careers. Initiatives are designed to enhance the awareness and appeal of the sector, therefore attracting those people with a desire to be a part

of the tourism industry because of their shared values.

### **5.2. Enhance workforce attraction, recruitment and retention efforts.**

Promoting an understanding of tourism's true economic, sociocultural and environmental benefits to people and communities will help enhance perceptions of the industry. There is a need to constantly affirm this as the foundation of building tourism as an attractive industry in which to work. This alone cannot work unless there is a clear understanding and comprehensive activities to address current barriers to tourism's attraction and retention efforts. Tourism will strive to offer access to good work opportunities, supportive conditions and career advancement opportunities.

### **5.3. Advance partnerships to support immigration priorities.**

Newfoundland and Labrador tourism stakeholders have been collaborating for some time to identify solutions that address labour challenges. There are opportunities for industry and government to continue to work on many fronts with federal and provincial partners to improve access to immigration pathways that improve labour availability.

**5.4. Improve quality and standards for frontline service delivery.**

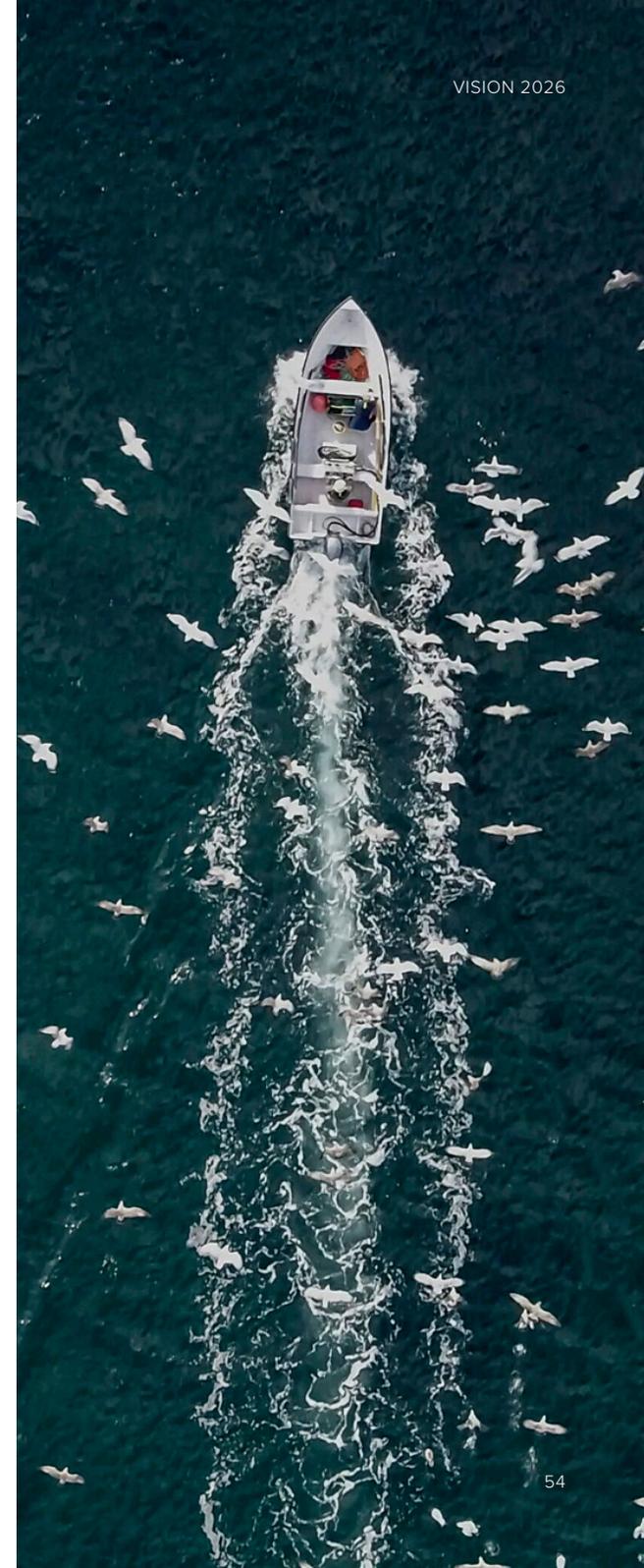
Welcoming visitors and making them feel at home is what the industry does best. Tourism’s success is dependent on visitor satisfaction so a commitment to continuing to raise the bar on professional service quality, complemented by Newfoundland and Labrador’s authentic charm and hospitality will be a priority.

**5.5. Improve access to the skills and training support required to improve experiences, management and growth.**

To be competitive, tourism must constantly adapt to ensure the right skill sets are available in the labour market. Understanding skills and training gaps for now and the future, and providing effective training opportunities, helps ensure standards and qualifications are met and high-quality service and safe experiences are delivered. Private sector engagement in training is crucial, particularly for frontline service delivery. Authentic hospitality and customer service excellence must be advanced as the cornerstone of Newfoundland and Labrador’s warm and welcoming brand.

**5.6. Improve the awareness of dynamic career and entrepreneurial opportunities available in tourism.**

People that are drawn to work in the tourism industry have a deep connection and love of Newfoundland and Labrador and want to share the stories of this place with the world. The industry provides exciting and dynamic careers and business ownership opportunities that need to be better known. And done well, visitors that come for a vacation may come back for a place to call home, work remotely, start a business or invest in the province in some way.



# Pillar 6

## Diversity, Inclusion and Well-being

This pillar reinforces the importance of understanding the needs of diverse groups in tourism development decisions and creating an inclusive industry. The tourism industry will strive to be a diverse and inclusive sector that supports cultural understanding and builds connections with all communities and cultures.

### OUTCOMES

**Working to achieve the objectives of this pillar will result in the following:**

- The tourism industry is a diverse and inclusive sector that supports cultural understanding and exchange and builds connections with all cultures.
- Tourism's warmth, welcome and hospitality attract people to the province and communities.



**OBJECTIVES**

**The objectives of this pillar are as follows:**

**6.1. Ensure that the needs of diverse groups are understood in tourism development.**

It is important to ensure the needs of diverse groups are understood and reflected in tourism development and that efforts are made to create a diverse and inclusive industry. Priorities include supporting Indigenous engagement and tourism development and improving access to opportunities for women, youth, mature workers and people from diverse groups.

**6.2. Implement meaningful efforts aimed at improving inclusion opportunities for diverse groups.**

There are many organizations representing diverse groups that can help build the tourism industry’s inclusion efforts. Partnerships with these organizations will help broaden tourism’s welcome to new people and cultures.

**6.3. Advance initiatives that increase accessibility to tourism experiences.**

Tourism and travel are recognized as an important part of people’s health and well-being. Improving access to the wonderful experiences and attractions available in Newfoundland and Labrador to

people with disabilities is an important responsibility of the tourism industry. Understanding accessibility needs will enable the industry to take active steps to remove barriers to access.

**6.4. Establish partnerships that support Indigenous awareness and reconciliation.**

Activity related to Indigenous tourism is growing in Canada and through these activities, tourism fosters and leads to greater awareness, understanding and reconciliation. Collaboration with Indigenous governments and organizations in Newfoundland and Labrador will help facilitate this opportunity.

**6.5. Establish partnerships with relevant stakeholders that maximize investments in well-being initiatives.**

The tourism sector must take constructive steps to integrate tourism’s positive contributions to health, well-being and quality of life. Attention to the real or perceived negative impact of tourism on communities should be considered in tourism development and management, and negative impacts should be understood and, where possible, addressed. Efforts are also needed to ensure that communities are interested in and supportive of tourism and that tourism stakeholders respect the points of view of community representatives.

**6.6. Establish partnerships with relevant stakeholders to support immigration efforts and create a sense of welcome and belonging.**

Welcoming people from diverse backgrounds is an important responsibility of the tourism industry. Beyond the opportunities to support growth in labour supply, new business entrants and visitor demand, tourism is naturally and authentically a catalyst of cultural exchange where deep connections are made.



# Pillar 7

## Sustainability of Natural and Cultural Environment

This pillar reinforces the need to focus on the sustainability of the province's high-value natural and cultural attractions as the foundation of experiences offered in Newfoundland and Labrador. The tourism industry is a catalyst for celebrating, honouring and promoting these tangible and intangible natural and cultural assets.

### OUTCOMES

**Working to achieve the objectives of this pillar will result in the following:**

- The tourism industry is a catalyst for celebrating, honouring and promoting Newfoundland and Labrador's natural and cultural environment.
- Respecting people, place and culture, there is sustainability of the province's natural beauty, biodiversity and cultural vibrancy.





## OBJECTIVES

The objectives of this pillar are as follows:

### 7.1. Ensure clear understanding of sustainability principles for the province's most important high-value natural and cultural assets that support tourism growth.

Experiences that are most sought-after are those based on nature and wilderness, including the ocean, coastline, wildlife and geology experiences, and local culture, including, festivals and events, culinary, local art, live entertainment

and Indigenous experiences. It also includes history and heritage found at lighthouses, historic sites, world heritage sites, museums and galleries. These sought-after demand generators are our highest value tourism assets, and therefore enhanced efforts are needed to ensure that these assets are protected and promoted.

### 7.2. Focus efforts on building capacity for climate change adaptation.

Private and public tourism stakeholders recognize the need to focus efforts on climate change.

Tourism operations are experiencing impacts from weather changes, coastal erosion and seasonal changes. Tourism will play a leading role in the provincial response to climate change. Changing weather patterns, changing seasons, impacts on landscapes, coastlines and infrastructure are all real challenges that require attention. Through a strong collaborative commitment to tackling pressing environmental challenges, tourism can also help achieve goals for sustainable use of energy, water, waste and biodiversity.

**7.3. Support the sustainability, conservation and celebration of natural heritage assets.**

Natural heritage assets are a core pillar on which Newfoundland and Labrador’s tourism is built. These assets are also exceptionally important to locals and communities. Respecting the natural environment through balanced, regenerative goals will conserve these precious natural places. Private and public leaders need to ensure effective management and conservation of these high-value areas and assets for well-being, quality of life and tourism attraction.

**7.4. Support the sustainability, conservation and celebration of cultural heritage assets.**

Similar to the natural environment, culture is a brand pillar. Tourism experiences in the province are deeply steeped in the cultural environment and efforts to advance more partnership opportunities for tourism and arts and cultural industries will support sustainability of this important experience and value offering.

**7.5. Advance partnerships with arts and cultural industries to further sustainability efforts.**

Part of the sustainability of the tourism industry is the sustainability of creative and cultural industries. Deepening relationships to support sustainable goals and to expand experience development,

promotions and capacity building will help sustainability for all.

**7.6. Advance partnerships with agriculture, fisheries and other sectors to increase access to local products.**

Visitors want to experience local food culture and have access to locally produced goods. There are many opportunities to deepen the local supply of goods and products in tourism. This activity will support many partnerships to enhance the overall resiliency of other business sectors.



# Pillar 8

## Resiliency of Tourism Operations

This pillar reinforces the need to focus on the sustainability and resiliency of tourism operations as the foundation of the tourism industry in the province.

### OUTCOMES

**Working to achieve the objectives of this pillar will result in the following:**

- Tourism operations are resilient, adaptable, profitable and sustainable.
- Tourism provides dynamic trade and investment opportunities for long-term growth and prosperity.



## OBJECTIVES

The objectives of this pillar are as follows:

### 8.1. Explore frameworks for sustainable tourism operations that include economic, sociocultural and environmental practices.

It is reported through tourism operator surveys that business liquidity remains the number one challenge facing many in the tourism sector. Small and medium-sized enterprises are carrying significant debt, with a limited ability to take on more debt. Many established businesses and organizations are devalued due to the drops in visitation affecting business growth activities like property upgrades and succession planning.

### 8.2. Support tourism operations by offering programs and supports that help accelerate growth, build resiliency, create exceptional experiences, drive innovation and extend seasons.

The sector has implemented practical strategies for its sustainability while also reinvesting in experience development. Supports and programs are available to the industry but ensuring that gaps in programs are addressed so that businesses can operate while they build back is important.

### 8.3. Focus efforts on building industry’s technology adoption and engagement.

There has never been a clearer understanding of how important digitalization is for the future of sustainable operations. Making strides to advance technology adoption will not only improve the industry’s resilience but also open the industry to new ways of offering services, connecting with customers and managing operations.

### 8.4. Enhance industry awareness and investment in climate change adaptations.

Sustainability requires a consistent level of monitoring of the impact on the environment from tourism. Individual operations need the tools to monitor their impacts and sufficient resources to mitigate climate impacts.

### 8.5. Increase efforts to improve tourism operations’ energy efficiency.

With the vast footprint of tourism facilities and assets throughout the province, supporting tourism stakeholders to source renewable, energy-efficient facilities and practices will greatly impact the province’s goal of growing clean industries and engaging with investors from around the world as the global destination of choice for green investment. Efforts will be needed to reduce energy use, improve energy efficiency and increase use of renewable energy options. Tourism operations need access to technical and practical knowledge

as well as programs and policies.

### 8.6. Advance opportunities to promote the business investment and entrepreneurial opportunities in the tourism industry.

Attracting entrepreneurs and investors who are willing to invest in new product development or take over existing operations is an important priority. Building awareness of the importance of tourism and the opportunities for business investment will help business succession planning that ensures the required capacity of attractions and services in the province.



SECTION III

# Next Steps



The goals of Vision 2026 are those of the collective industry – the diverse private, public, and non-profit and community organizations – that come together to form this dynamic and engaging industry.

Partners of the Newfoundland and Labrador Tourism Board understand the importance of working together and using available resources wisely to develop the tourism industry for long-term success.

The tourism industry is equipped to lead the charge to transition the sector through its recovery. Moving forward, private and public partners will evolve the leadership structure and governance to ensure that it continues to expand its reach to tourism partners that have a critical role in Vision 2026. This continued journey will enable the growth and development of a tourism industry that the entire province is proud of and that sustains a bright future for people and communities in Newfoundland and Labrador. A Strategic Action Plan is provided in Annex A.





ANNEX A

# Strategic Action Plan

## As a collective, the tourism industry must work together to achieve the goals and objectives outlined in Vision 2026.

Striking a balance between strategic forward thinking and on-the-ground implementation through partnership and collaboration will be critical to the success of Vision 2026. Sharing in the responsibility of advancing actions, the private-public collaboration will help align efforts to advance the industry now and into the future.

The following section outlines the objectives and actions in each of the eight pillars.



## Pillar 1 – Tourism Policy and Recognition

<b>OBJECTIVE 1</b>	<b>Strengthen the recognition of tourism as a force to achieve strong economic, sociocultural and environmental benefits.</b>
<b>TRANSITION</b> 2022 – 2023	<b>A.</b> Prepare a framework that captures the economic, sociocultural and environmental goals and performance metrics to measure tourism’s contribution.
<b>TRANSFORM</b> 2024 – 2026	<b>B.</b> Update value of tourism messages and execute communications and awareness plan activities with key target groups. <b>C.</b> Evaluate performance measurement framework for areas of improvement in measuring and communicating tourism’s value to the province.
<b>THRIVE</b> 2026+	Performance measurement framework efficiently and effectively measures tourism’s contribution to the province and communication processes ensure that stakeholders recognize tourism’s value.

<b>OBJECTIVE 2</b>	<b>Support a private-public provincial tourism vision and strategy that advances tourism growth.</b>
<b>TRANSITION</b> 2022 – 2023	<b>A.</b> Launch the private-public collaborative Vision 2026. <b>B.</b> Prepare an action plan to implement transition priorities.
<b>TRANSFORM</b> 2024 – 2026	<b>C.</b> Complete regular evaluation and communication of the status of objectives and actions. <b>D.</b> Adapt action plan to address gaps and opportunities from regular evaluation. <b>E.</b> Develop strategic planning processes to prepare 2026 – 2030 strategy.
<b>THRIVE</b> 2026+	Tourism’s strategy is continuously adapting and improving to achieve growth.

**OBJECTIVE 3** Advance collaborative implementation and focus resources efficiently and effectively.

**TRANSITION**  
2022 – 2023  
A. Assess current workforce capacity within private-public partnership to implement actions and adapt to address priorities.

**TRANSFORM**  
2024 – 2026  
B. Align implementation action plan with collaborative partners.

**THRIVE**  
2026+  
There is continuous strategic evolution of the collaborative efforts to implement actions.

**OBJECTIVE 4** Implement an effective legislative and regulatory framework in priority areas.

**TRANSITION**  
2022 – 2023  
A. Launch Tourist Accommodations Act and Regulations (TAA).  
B. Launch new awareness and enforcement activities for TAA.  
C. Establish agreements with short-term rental platforms for the adherence with TAA.

**TRANSFORM**  
2024 – 2026  
D. Identify priority legislative and regulatory barriers and analyze solutions.  
E. Prepare an action plan to advance improvements to legislative and regulatory priorities.

**THRIVE**  
2026+  
Legislation and regulatory framework reflect tourism priorities that encourages strong private sector investment.



**OBJECTIVE 5** Leverage support, investment and interest at municipal, Indigenous, provincial, federal and international levels.

**TRANSITION**  
2022 – 2023  
A. Engage with key municipal, Indigenous, provincial and federal departments and agencies to communicate Vision 2026.

**TRANSFORM**  
2024 – 2026  
B. Prepare and execute an engagement plan to build awareness of tourism values and opportunities that invites municipalities to take an active role in strategy implementation at the community level.  
C. Implement regular communication efforts with federal departments that have a role in tourism about Vision 2026, priorities and opportunities for partnerships.  
D. Understand current gaps and opportunities in the engagement plan and adapt for improvements.

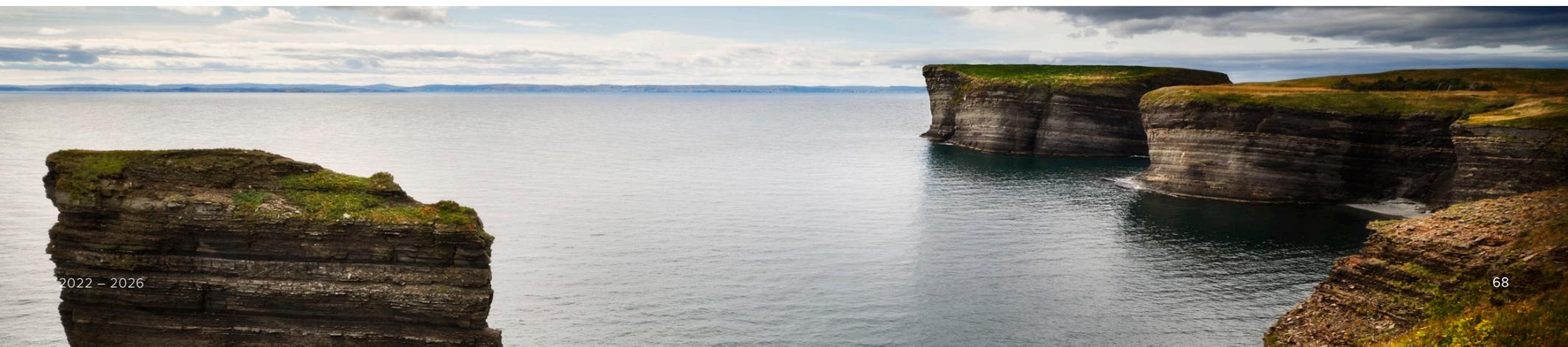
**THRIVE**  
2026+  
Tourism receives relevant support, interest and investment from various levels of government.

**OBJECTIVE 6** Increase local engagement and awareness of tourism’s contribution to the quality of life and well-being of communities.

**TRANSITION**  
2022 – 2023  
A. Active promotion of the vision and strategy to locals and communities.

**TRANSFORM**  
2024 – 2026  
B. Identify ways to engage with locals and communities to build awareness, make connections and secure participation in tourism-related activities.  
C. Explore opportunities to build partnerships with local suppliers and producers.

**THRIVE**  
2026+  
Locals and communities are key stakeholders, drivers and beneficiaries of tourism’s success.



## Pillar 2 – Leadership and Governance

**OBJECTIVE 1** Evolve tourism leadership structure and governance to effectively partner with diverse stakeholders to advance Vision 2026.

**TRANSITION**  
2022 – 2023

**A.** Empower the current Newfoundland and Labrador Tourism Board to implement short-term actions of the Transition phase pending analysis of leadership structure.

**B.** Complete an evaluation of Vision 2020 and the effectiveness of the private-public leadership model.

**C.** Communicate results of the evaluation and collaborate to implement strategic changes to the leadership structure and governance.

**TRANSFORM**  
2024 – 2026

**D.** Develop roles, responsibilities and an implementation plan with structure and partners to enable effective implementation of actions.

**E.** Continue to adapt the leadership model to ensure diverse voices and engaged leaders.

**THRIVE**  
2026+

Tourism’s leadership and governance effectively drives the priorities of Vision 2026 and collaborates with relevant stakeholders to achieve goals.

**OBJECTIVE 2** Support alignment efforts that ensure strong collaboration to achieve goals and objectives.

**TRANSITION**  
2022 – 2023

**A.** Develop a communications plan and implement processes to build awareness of Vision 2026.

**TRANSFORM**  
2024 – 2026

**B.** Align regional and sector plans with priorities of Vision 2026.

**C.** Regularly measure effectiveness of collaboration and adapt alignment activities as needed.

**THRIVE**  
2026+

Tourism stakeholders are aware of, and actively implementing, their roles in the provincial vision and strategy.

**OBJECTIVE 3** Advance efforts that encourage strong private sector engagement.

**TRANSITION** 2022 – 2023  
**A.** Undertake a leadership recruitment process to encourage more participation from private sector.

**TRANSFORM** 2024 – 2026  
**B.** Regularly evaluate and adapt leadership recruitment processes based on effectiveness in achieving private sector engagement.

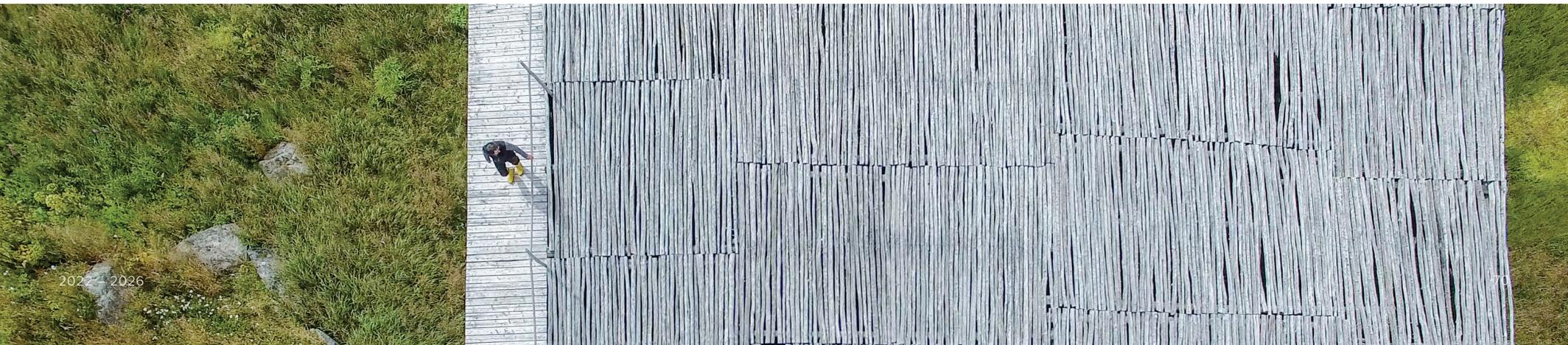
**THRIVE** 2026+  
 There is a diverse mix of private sector leaders engaged in tourism leadership and there are succession plans for leadership positions.

**OBJECTIVE 4** Enhance processes for stakeholder engagement with diverse range of relevant stakeholders.

**TRANSITION** 2022 – 2023  
**A.** Assign roles to implement a communication and awareness plan to build awareness of and support for Vision 2026.

**TRANSFORM** 2024 – 2026  
**B.** Enhance and grow relationships and partnerships with key travel, tourism, and hospitality stakeholders and other sectors to achieve vision priorities.  
**C.** Implement initiatives to fill gaps and opportunities in stakeholder engagement.

**THRIVE** 2026+  
 Tourism leadership is engaged with diverse, relevant stakeholders that partner to implement common goals.



**OBJECTIVE 5** Improve local engagement and integrate local supply in tourism.

**TRANSITION** 2022 – 2023 **A.** Implement efforts to improve engagement with communities/municipalities and locals to build awareness and opportunities to support Vision 2026.

**TRANSFORM** 2024 – 2026 **B.** Offer opportunities for tourism operations to network with local product and service providers to explore partnerships.  
**C.** Assess engagement effectiveness and adjust actions to reflect recommendations for improvements.

**THRIVE** 2026+ Locals and businesses understand the value of tourism and proactively seek out tourism partnerships.

**OBJECTIVE 6** Support initiatives aimed at building tourism leadership capacity and engagement.

**TRANSITION** 2022 – 2023 **A.** Identify leadership values and qualifications and initiate mentoring, coaching and training to equip future leaders.

**TRANSFORM** 2024 – 2026 **B.** Explore opportunities to expand tourism leadership development, learning and capacity development through leadership best practices training.

**THRIVE** 2026+ There are opportunities for tourism leaders to deepen their skills and expertise that help advance success in the tourism industry.



## Pillar 3 – Economic Performance, Investment and Business Environment

**OBJECTIVE 1** Establish economic, sociocultural and environmental performance indicators that capture tourism’s contribution.

**TRANSITION**  
2022 – 2023 A. Develop a performance metric framework to measure Vision 2026 outcomes.

**TRANSFORM**  
2024 – 2026 B. Adapt performance indicators to reflect new strategies and actions.  
C. Track and report key performance indicators.

**THRIVE**  
2026+ Tourism has clear and achievable economic, sociocultural and environmental goals.

**OBJECTIVE 2** Enhance provincial tourism research and continuous monitoring activities.

**TRANSITION**  
2022 – 2023 A. Complete a non-resident visitor survey.  
B. Complete a resident travel survey.  
C. Prepare for the implementation of a comprehensive air and auto exit survey.

**TRANSFORM**  
2024 – 2026 D. Develop a new research plan to enhance access to timely travel and consumer research, insights and analytics as well as key performance indicators.  
E. Investigate new data sources and establish research partnerships.  
F. Implement annual exit surveying activities.  
G. Provide regular and timely tracking and communication of leading indicators such as travel intentions, consumer behaviour, booking behaviour, etc.  
H. Continue tracking of resident travel intelligence.

**THRIVE**  
2026+ Research is robust and helps inform the development of evidence-based strategies.

**OBJECTIVE 3** Complete an economic impact analysis for tourism that can be used as a framework to regularly measure tourism’s contribution.

**TRANSITION** 2022 – 2023 A. Complete an economic impact analysis.

**TRANSFORM** 2024 – 2026 B. Implement annual updating of economic impact data and communicate results with stakeholders.

**THRIVE** 2026+ There is a clear understanding of tourism’s economic impact, including direct, indirect and induced benefits.

**OBJECTIVE 4** Maximize private and public investments by aligning strategies and implementation efforts towards vision priorities.

**TRANSITION** 2022 – 2023 A. Work with industry to collaboratively implement 2022-2023 investments in transition phase actions.

**TRANSFORM** 2024 – 2026 B. Identify gaps in funding opportunities and ensure programs and supports are reflective of Vision 2026 priorities.

C. Make efforts to build awareness of, and increase engagement in, federal funding opportunities.  
 D. Assess effectiveness of current funding programs and adapt as needed.

**THRIVE** 2026+ Tourism leverages public and private investments to advance growth.



**OBJECTIVE 5** Support investment attraction initiatives.

**TRANSITION**  
2022 – 2023

**A.** Identify current capacity gaps in attractions and services and engage in efforts to drive private investment attraction.

**TRANSFORM**  
2024 – 2026

**B.** Prepare long-term investment attraction plan focused on addressing major capacity gaps, particularly in major gateways and clusters.

**C.** Continue to implement investment attraction efforts, adapting as needs change.

**THRIVE**  
2026+

Tourism drives private investment to build the industry and address capacity gaps.

**OBJECTIVE 6** Ensure tourism industry impacts and opportunities are understood for trade opportunities.

**TRANSITION**  
2022 – 2023

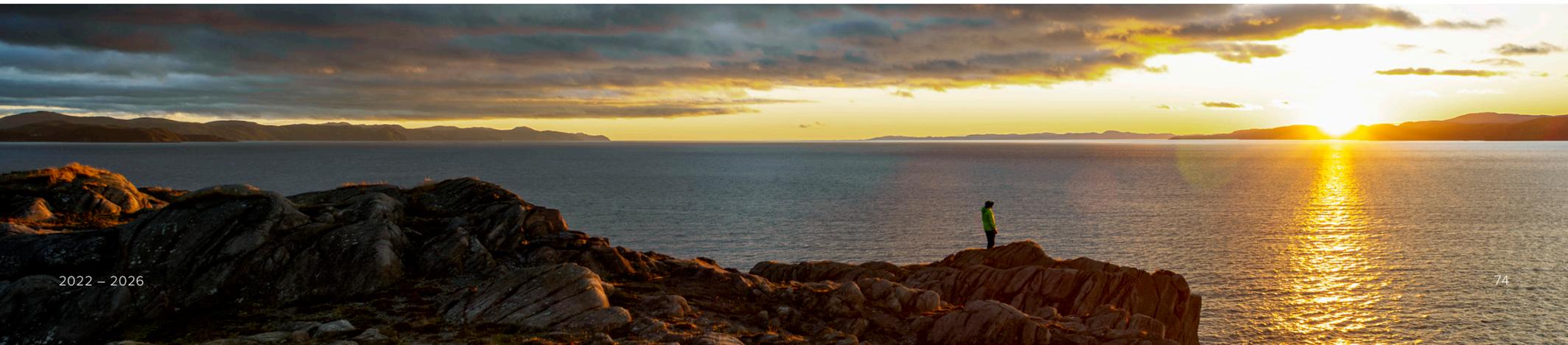
**A.** Understand important trade policy opportunities and barriers and prepare clear messaging for communications and advocacy.

**TRANSFORM**  
2024 – 2026

**B.** Explore opportunities to partner with other sectors to advance export opportunities.

**THRIVE**  
2026+

Trade policies are developed with an understanding of impacts on tourism and there are opportunities to partner with other sectors to grow export opportunities.



## Pillar 4 – Competitiveness

**OBJECTIVE 1** Implement initiatives that build air access capacity and increase affordability and efficiency of transportation and connectivity systems.

**TRANSITION**  
2022 – 2023

**A.** Implement strategic air access investment initiatives.  
**B.** Implement engagement activities with car rental agencies and identify solutions to improve car rental capacity.  
**C.** Invest in branded Welcome to Newfoundland and Labrador signage at major gateways.

**TRANSFORM**  
2024 – 2026

**D.** Build a collaborative network with major transportation providers for air, road and marine access to enable an efficient multi-modal transportation system.  
**E.** Work with transportation providers to improve access capacity, affordability, efficiency, service excellence and sense of arrival and departure.

**F.** Explore solutions to address taxi shortage and other short-haul transportation challenges.

**G.** Support efforts to expand the number of electric vehicle charging stations.

**H.** Advance Tourist-Oriented Directional Signage Policy.

**I.** Make strategic investments in improving regional attractions and themed route signage.

**J.** Work with partners in main gateways and clusters to improve the sense of arrival.

**K.** Advance connectivity in the province through effective advocacy and identification of priorities.

**THRIVE**  
2026+

There is an efficient transportation and connectivity system in the province and collaboration takes place among tourism and transportation stakeholders to respond to opportunities and challenges as they arise.

**OBJECTIVE 2** Invest in effective and focused tourism brand and marketing strategies in collaboration with the tourism industry.

**TRANSITION** 2022 – 2023  
**A.** Undertake a Marketing Strategy Review and implement recommendations.

**B.** Work with industry partners to align marketing efforts.

**TRANSFORM** 2024 – 2026  
**C.** Examine gaps in the path to purchase and address challenges to increase sales.

**D.** Implement an event attraction strategy to increase business events, Meetings, Conventions and Incentive Travel (MC&IT), sport tourism and cultural events – particularly in shoulder and winter seasons.

**E.** Refresh travel trade strategy and develop processes to monitor return on investment and enhance strategic review of effectiveness and selection of shows.

**F.** Enhance partnership activities with inbound and receptive tour operators, online travel agents and transportation partners.

**G.** Explore current technology gaps in delivery of marketing and sales efforts.

**H.** Ensure resources receive continual investment to build on market opportunities and to tap into key market segments.

**I.** Actively assess the evolution of new marketing tools and technology advances that ensure Newfoundland and Labrador remains a leading destination.

**THRIVE** 2026+  
 Marketing strategy is competitive and stakeholders are aligned to maximize investments in tourism marketing.



**OBJECTIVE 3** Create exceptional experiences along all touchpoints of the visitor journey.

**TRANSITION**  
2022 – 2023

**A.** Provide priority experience development support to tourism operations.

**B.** Refresh provincial product development plan and visitor journey priorities.

**TRANSFORM**  
2024 – 2026

**C.** Identify priorities for increasing quality and market-readiness along all touchpoints.

**D.** Align regional and sector plans with Vision 2026 and product development plan.

**E.** Develop tourism clusters and gateway action plans aligned with Vision 2026 and product development plans.

**F.** Implement regenerative lens in tourism experience development and prepare tools, as needed, to support industry education and development.

**G.** Increase accessibility to tourism experiences throughout the province.

**H.** Complete milestone assessment of existing products and experiences, and refresh priorities.

**THRIVE**  
2026+

Tourism experiences are high quality, authentic and accessible, and provide opportunities for connections between visitors and locals.



**OBJECTIVE 4** Focus experience development on priority areas of arts and culture, culinary, Indigenous and nature experiences.

**TRANSITION** 2022 – 2023  
**A.** Establish these areas as core experience categories and increase the number and quality of experiences.

**TRANSFORM** 2024 – 2026  
**B.** Engage with arts and culture-based and nature-based organizations as core experience providers to identify opportunities for partnerships.  
**C.** Engage with Indigenous organizations to support the development and promotion of Indigenous experiences and implementation of Indigenous tourism strategies.  
**D.** Implement culinary tourism development initiatives.  
**E.** Increase engagement with other sectors to increase access to local product and experiences.

**THRIVE** 2026+  
 Tourism experiences celebrate and promote Newfoundland and Labrador’s vibrant people, culture and natural environment.

**OBJECTIVE 5** Improve the quality and market-readiness of experiences along all touchpoints of the visitor journey.

**TRANSITION** 2022 – 2023  
**A.** Identify specific quality assurance gaps and develop targeted initiatives to improve quality.

**TRANSFORM** 2024 – 2026  
**B.** Embed a quality assurance objective in all initiatives.  
**C.** Provide employers and employees with professional development opportunities to meet the industry standards to improve the quality of products, customer service and visitor experiences.  
**D.** Develop market-readiness supports and tools that will help guide investment for tourism operations for customer service, technology adoption, climate change adaptation, energy efficiency and sustainable/regenerative tourism practices, etc.

**THRIVE** 2026+  
 There is high quality of service along all touchpoints of the visitor journey and there is a culture of service excellence in the tourism industry.



**OBJECTIVE 6** Advance efforts to establish year-round and seasonal tourism clusters.

- TRANSITION**  
2022 – 2023
- A.** Invest in year-round and seasonal cluster initiatives to build capacity and promotions.
  - B.** Establish Celebrate NL to build event capacity support.
- TRANSFORM**  
2024 – 2026
- C.** Work with partners to execute an event attraction strategy to increase the number of business events, MC&IT, sport tourism and cultural events – particularly in winter and shoulder seasons.
- THRIVE**  
2026+
- Tourism offers year-round opportunities for resident and non-resident visitation.



## Pillar 5 – Employment

### **OBJECTIVE 1** Implement effective workforce plan and policies.

**TRANSITION**  
2022 – 2023  
A. Implement immediate workforce actions to address short-term labour gaps by accessing new immigration and labour pool opportunities.

**TRANSFORM**  
2024 – 2026  
B. Implement a comprehensive workforce plan.  
C. Advance continuous efforts to understand and communicate labour market intelligence.  
D. Continue to improve access to data and analytics.  
E. Implement continuous monitoring of labour demand and supply challenges, and adapt actions accordingly.

**THRIVE**  
2026+  
Tourism is well-resourced with labour supply options and nimble in its approach to responding to challenges as they arise.

### **OBJECTIVE 2** Enhance workforce attraction, recruitment and retention efforts.

**TRANSITION**  
2022 – 2023  
A. Showcase opportunities and values of tourism to attract and retain new operators and workers.  
B. Execute We Are Tourism campaign.

**TRANSFORM**  
2024 – 2026  
C. Identify new labour pools and develop attraction initiatives.  
D. Identify opportunities for modifications to government policy to open new labour pools available in the province.  
E. Examine opportunities to enhance recruitment and retention campaigns.

**THRIVE**  
2026+  
The provincial tourism industry is viewed as a dynamic industry with many career path opportunities.

**OBJECTIVE 3 Advance partnerships to support immigration priorities.**

**TRANSITION**  
2022 – 2023  
**A.** Utilize opportunities available to increase tourism industry engagement in immigration opportunities.

**TRANSFORM**  
2024 – 2026  
**B.** Engage in communication efforts to improve operator knowledge and engagement in immigration opportunities.  
**C.** Work with immigration partners to advocate for immigration policy and processes to address priorities as needed.

**THRIVE**  
2026+  
Immigration is a part of the labour supply options for the tourism industry.

**OBJECTIVE 4 Improve quality and standards for frontline service delivery.**

**TRANSITION**  
2022 – 2023  
**A.** Promote quality standards for frontline careers in tourism.

**TRANSFORM**  
2024 – 2026  
**B.** Examine gaps in frontline standards and address as needed.  
**C.** Prioritize new program supports to improve the quality and standards of customer service.

**THRIVE**  
2026+  
Visitors receive high quality customer service and experiences along all touchpoints of the visitor journey.



<b>OBJECTIVE 5</b>	<b>Improve access to the skills and training support required to improve experiences, management and growth.</b>
<b>TRANSITION</b> 2022 – 2023	<b>A.</b> Identify capacity gaps in accessing short-term skills and training.
<b>TRANSFORM</b>	<b>B.</b> Build relationships with education institutions to ensure skills and training programs are reflective of evolving needs of employers. <b>C.</b> Foster and support the provincial skills and knowledge action plan for attracting, training and retaining a skilled tourism workforce; and for actively aligning with education and training providers.
<b>THRIVE</b> 2026+	People in the tourism industry have access to the skills and training they need to perform their roles effectively.

<b>OBJECTIVE 6</b>	<b>Improve the awareness of dynamic career and entrepreneurial opportunities available in tourism.</b>
<b>TRANSITION</b> 2022 – 2023	<b>A.</b> Prepare and share key messages about the dynamic career opportunities available in the industry.
<b>TRANSFORM</b> 2024 – 2026	<b>B.</b> Engage in awareness activities to promote entrepreneurial opportunities. <b>C.</b> Prepare a long-term approach to continue awareness and education about the dynamic opportunities in the tourism industry.
<b>THRIVE</b> 2026+	Tourism is recognized for offering quality, meaningful work at various levels as well as business investment opportunities.



## Pillar 6 – Diversity, Inclusion and Well-Being

<b>OBJECTIVE 1</b>	<b>Ensure that the needs of diverse groups are understood in tourism development.</b>
<b>TRANSITION</b> 2022 – 2023	<p><b>A.</b> Engage in efforts to understand and build awareness of the needs of diverse groups.</p> <p><b>B.</b> Embed a diversity lens in initiatives and take active steps to promote diversity in the industry.</p>
<b>TRANSFORM</b> 2024 – 2026	<b>C.</b> Prepare a long-term approach to continue understanding and engagement with diverse groups in tourism.
<b>THRIVE</b> 2026+	The needs of diverse groups are recognized, and efforts are made to address barriers.

<b>OBJECTIVE 2</b>	<b>Implement meaningful efforts aimed at improving inclusion opportunities for diverse groups.</b>
<b>TRANSITION</b> 2022 – 2023	<b>A.</b> Implement initiatives aimed at including diverse groups in tourism development, employment and promotions.
<b>TRANSFORM</b> 2024 – 2026	<p><b>B.</b> Partner with groups and organizations that can open access to diverse groups and to build capacity to address needs.</p> <p><b>C.</b> Develop regular programming that increases the inclusion of diverse groups into tourism networks.</p>
<b>THRIVE</b> 2026+	There are opportunities offered for diverse groups to participate in the tourism industry.

**OBJECTIVE 3** Advance initiatives that increase accessibility to tourism experiences.

**TRANSITION** 2022 – 2023  
**A.** Implement and support initiatives that increase accessibility to tourism experiences.

**TRANSFORM** 2024 – 2026  
**B.** Work with accessibility organizations to identify priorities and implement initiatives.  
**C.** Embed a long-term accessibility lens in initiatives and take active steps to promote accessible experiences.

**THRIVE** 2026+  
 Tourism operations have made advancements in being accessible to all.

**OBJECTIVE 4** Establish partnerships that support Indigenous awareness and reconciliation.

**TRANSITION** 2022 – 2023  
**A.** Support Indigenous awareness and reconciliation by partnering with Indigenous governments and organizations to advance tourism development priorities.

**TRANSFORM** 2024 – 2026  
**B.** Identify opportunities to expand Indigenous cultural understanding and awareness.

**THRIVE** 2026+  
 Tourism is a means of supporting Indigenous awareness and reconciliation.



**OBJECTIVE 5** Establish partnerships with relevant stakeholders that maximize investments in well-being initiatives.

**TRANSITION**  
2022 – 2023 A. Identify opportunities with stakeholders in sport, recreation and community development to promote tourism and well-being experiences.

**TRANSFORM**  
2024 – 2026 B. Establish partnerships that advance marketing, product and capacity-building initiatives around shared tourism and well-being priorities.

**THRIVE**  
2026+ Tourism helps support health and well-being of people and communities.

**OBJECTIVE 6** Establish partnerships with relevant stakeholders to support immigration efforts by creating a sense of welcome and belonging.

**TRANSITION**  
2022 – 2023 A. Make connections with relevant stakeholders to identify opportunities to improve the way in which new and existing immigrants are welcomed.

**TRANSFORM**  
2024 – 2026 B. In collaboration with relevant stakeholder groups, partner to implement initiatives that help improve the sense of welcome and belonging for immigrants.

**THRIVE**  
2026+ Tourism helps create an environment of belonging in communities.



## Pillar 7 – Sustainability of Natural and Cultural Environment

**OBJECTIVE 1** Ensure clear understanding of sustainability principles for the province’s most important high-value natural and cultural assets that support tourism growth.

**TRANSITION** 2022 – 2023  
A. Identify high-value natural and cultural assets that support tourism growth.

**TRANSFORM** 2024 – 2026  
B. Implement measures, such as sustainability principles and management processes, to monitor, protect, preserve and promote high-value assets.

**THRIVE** 2026+  
High-value assets are managed effectively to support tourism growth.

**OBJECTIVE 2** Focus efforts on building capacity for climate change adaptation.

**TRANSITION** 2022 – 2023  
A. Action a communications plan to increase tourism industry awareness of climate change impacts and implement adaptation efforts.

**TRANSFORM** 2024 – 2026  
B. Embed a climate change lens in tourism development.  
C. Advance initiatives that encourage operators to prepare for climate change impacts and implement climate change adaptations.  
D. Leverage investment supports that help operators adapt to climate change impacts.

**THRIVE** 2026+  
Tourism industry has the capacity to address major impacts of climate change to sustain high value assets and operations.

**OBJECTIVE 3** Support the sustainability, conservation and celebration of natural heritage assets.

**TRANSITION**  
2022 – 2023 A. Explore the opportunities to strengthen policies for high-value natural assets.

**TRANSFORM**  
2024 – 2026 B. Establish sustainability principles for the province’s most important high-value natural assets.  
C. Encourage adoption of sustainability principles for natural assets throughout the province.

**THRIVE**  
2026+ Tourism supports efforts for natural environment assets to be protected and sustainable.

**OBJECTIVE 4** Support the sustainability, conservation and celebration of cultural heritage assets.

**TRANSITION**  
2022 – 2023 A. Work with cultural stakeholders to align priorities for sustainability.

**TRANSFORM**  
2024 – 2026 B. Advance collaborative initiatives with cultural stakeholders to advance sustainability priorities.

**THRIVE**  
2026+ Tourism helps support sustainability priorities for cultural heritage assets.



**OBJECTIVE 5**    **Advance partnerships with arts and cultural industries to further sustainability efforts.**

**TRANSITION**  
2022 – 2023    **A.** Make connections with arts and cultural industry organizations to identify common priorities.

**TRANSFORM**  
2024 – 2026    **B.** Establish partnerships with arts and cultural industries and advance collective efforts that build resiliency and sustainability.

**THRIVE**  
2026+            Partnerships flourish and achieve common goals.

**OBJECTIVE 6**    **Advance partnerships with agriculture, fisheries and other sectors to increase access to local products.**

**TRANSITION**  
2022 – 2023    **A.** Implement partnership opportunities with other business sectors to promote local products, services and experiences.

**TRANSFORM**  
2024 – 2026    **B.** Identify partnership opportunities to increase business-to-business and business-to-consumer access to local food and beverage products.  
**C.** Identify partnership opportunities to increase business-to-business and business-to-consumer access to local crafts and locally-produced goods.

**THRIVE**  
2026+            Visitors have access to the local products and services they are seeking.



## Pillar 8 – Resiliency of Tourism Operations

**OBJECTIVE 1** Explore a framework for sustainable tourism operations that include economic, sociocultural and environmental practices.

**TRANSITION**  
2022 – 2023 A. Investigate sustainability frameworks for tourism operations.

**TRANSFORM**  
2024 – 2026 B. Implement priority initiatives that support sustainable tourism operations.

**THRIVE**  
2026+ Tourism operations have access to best practices and support for sustainability.

**OBJECTIVE 2** Support tourism operations by offering programs that help accelerate growth, build resiliency, create exceptional experiences, drive innovation and extend seasons.

**TRANSITION**  
2022 – 2023 A. Offer business supports that enable tourism operations to enhance and/or expand experience offerings and sustainability.

**TRANSFORM**  
2024 – 2026 B. Explore gaps in funding access to support tourism operations.  
C. Develop options to address funding gaps.

**THRIVE**  
2026+ Tourism operations have access to the right supports at the right time.

**OBJECTIVE 3** Focus efforts on building industry's technology adoption and engagement.

**TRANSITION** 2022 – 2023  
A. Support operations to advance their technology needs for immediate opportunities.

**TRANSFORM** 2024 – 2026  
B. Implement and support initiatives that increase tourism industry adoption of technology opportunities.  
C. Offer technology training and supports.  
D. Implement constant monitoring of technology opportunities to achieve greater competitiveness and growth.

**THRIVE** 2026+  
Tourism is effectively equipped to increase competitiveness through the adoption of technology.

**OBJECTIVE 4** Enhance industry awareness and investment in climate change adaptations.

**TRANSITION** 2022 – 2023  
A. Build awareness of climate change impacts and adaptation opportunities.

**TRANSFORM** 2024 – 2026  
B. Identify partnerships, programs and tools that will assist operators to make climate change adaptations.

**THRIVE** 2026+  
Tourism is taking active steps to address climate change impacts.



**OBJECTIVE 5** Increase efforts to improve tourism operations' energy efficiency.

**TRANSITION**  
2022 – 2023  
**A.** Communicate benefits of improving energy efficiency, reducing energy consumption and reducing waste, and build awareness of available funding programs.

**TRANSFORM**  
2024 – 2026  
**B.** Identify partnerships, programs and tools to assist operators achieve energy efficiency goals.  
**C.** Encourage investment in improving energy efficiency initiatives.

**THRIVE**  
2026+  
The tourism industry is improving its resiliency while also investing in the environment by becoming more energy efficient.

**OBJECTIVE 6** Advance opportunities to promote business investment and entrepreneurial opportunities in the tourism industry.

**TRANSITION**  
2022 – 2023  
**A.** Develop communications and awareness activities that promote business investment opportunities in the industry.

**TRANSFORM**  
2024 – 2026  
**B.** Work with key partners to develop succession planning tools and supports for business exits.

**THRIVE**  
2026+  
Opportunities for business investment are promoted and there are succession planning processes to help transition new entrants and existing businesses.

