

GREATER SOUTH EAST NEW BRUNSWICK REGIONAL TOURISM STRATEGY



**Submitted to the
Steering Committee
Greater South East New Brunswick Regional Tourism Strategy**

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EXECUTIVE SUMMARY

GREATER SOUTH EAST NEW BRUNSWICK REGIONAL TOURISM STRATEGY

Introduction and Purpose

The Greater South East (GSE) Region of New Brunswick is undeniably one of the most beautiful parts of the Province. With tourism lagging throughout Atlantic Canada, New Brunswick and the Region, Enterprise South East and Enterprise Kent partnered to develop a regional tourism strategy for this spectacular area. Tourism Synergy Ltd. is the independent firm that undertook an extensive planning exercise between December 2008 – May 2009 to produce the comprehensive three-year tourism development strategy.

The purpose of the strategy is to position the Greater South East New Brunswick Region as a successful regional tourist destination with a focus on building:

- *A cluster of unique and appealing multi-season tourism products and experiences.*
- *Strong positioning and coordinated marketing to reach key target markets.*
- *Effective implementation capacity with strong industry leadership and partnerships.*

Specific Objectives of the Planning Process were to:

1. Provide a GSE Region **tourism product/experience inventory** and classify products (attractions, activities and events) using a clustered approach (culture, heritage, nature) and also include an assessment of tourism amenities and services (i.e. visitor information centres, signage, accommodations, food service).
2. Identify **tourism product and market trends** relevant to Greater South East NB and expectations for future industry performance.
3. Specify the market-driven **product development opportunities** for the Greater South East Region as well as gaps and potential entrepreneurial opportunities with a focus on extending the season.
4. Specify the **general and niche markets** that best match existing and potential products/experiences (product/market match).
5. Provide a **coordinated marketing strategy** to effectively target these markets, position and brand the South East Region as a primary tourist destination area (that complements both Provincial and Greater Moncton approaches).
6. Identify the **links and partnerships to develop in order to mobilize organizational support** required to assist the key tourism stakeholders and industry leaders in implementing the new regional strategy and to build sector capacity at all levels, including Federal, Provincial, Municipal and Regional stakeholders.
7. Provide an overall **implementation plan** for a sustainable tourism strategy that includes: a) stakeholder roles, b) timelines, and c) estimated costs for rolling the strategy over the next three years.

A Bottom-Up Approach

- a) On-site visits throughout the region.
- b) Stakeholder interviews with over 30 tourism stakeholders.
- c) Three rounds of regional stakeholder input sessions.
- d) Meetings with representatives from the NB Department of Tourism and Parks (TAP) the Commission du tourisme acadien du Canada atlantique (CTACA), City of Moncton Tourism Dept., Enterprise Agencies (Kent and South East), many attractions and municipalities throughout the region.
- e) Review of existing research, studies, plans.

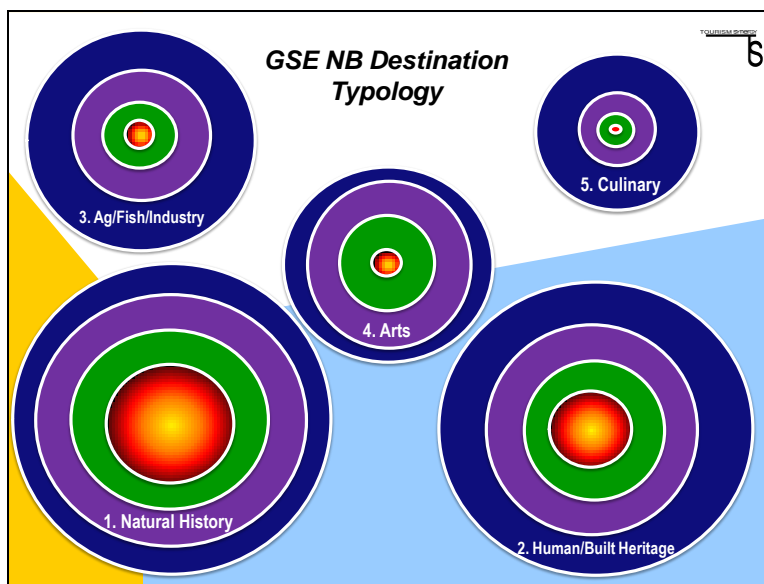
Overall Results & Observations

- Many tourism products are outdated and inconsistent with market demands.
- Perception that we are “lagging” in terms of:
 - Adoption of tourism technologies
 - Reinvestment in infrastructures
 - Access to information
 - Vision for tourism
 - Adoption of interactive/engaging experiences
 - Investment in business skills / training
 - Professionalism

Big shift toward → Experiential Tourism
A tourism product is what you buy.
A tourism experience is what you remember.

Product Inventory Highlights

- Over 300 tourism operators (combination of national, provincial, municipal, non profit and private sectors)
- Strong “lead” natural attractions.
- Strong human/built heritage (but story not told), with emphasis on Acadian culture.
- Arts Sector is building and has experiential opportunities.
- Agriculture and fishery links need to be highlighted.
- Culinary needs strengthening and linkages to locally produced agriculture and fish.
- Limited hands-on experiences.
- Accommodations: 81 fixed roof properties (16 are 4★); 733 units; 26 Campgrounds; 3,740 sites (50% seasonal).
- **Food Service:** 75 establishments



From the Centre in order of importance - Orange: Lead Attractions, Green: Support Attractions, Purple: Sustaining, Blue: Undeveloped (underway, planned, to be explored)

Major Markets

Visitation to NB down 22% from 2002-2008; Spending up 2% during same period.

Leading origin markets	Fundy Coastal Drive	Acadian Coastal Drive
• USA	29%	15%
• Ontario	23%	21%
• Quebec	20%	42%
• Regional (includes NB)	19%	15%
• Other	9%	7%

The Greater South Region should focus on:

1. The Region (NB, NS, PEI)
2. Quebec
3. Ontario & USA

And tie into NB Tourism & Parks and Greater Moncton markets (Moncton, Riverview, Dieppe).

Product Market Match

Major Visitation Motivators to Atlantic Canada and NB	Greater South East Strengths	Greater South East Weaknesses
1. Coastal Experiences	Strong coastal assets	Need Experiences
2. Sightseeing & Tours	Scenic vistas, picnic spots, attractions, galleries, museums.	Scenic & picnic spots not identified/linked; few regional self-guided itineraries; no organized tours.
3. Culture, Entertainment and Heritage	Acadian culture; major attraction, rich history; agriculture & fisheries producers	Regional story not told/linked; limited interactive, hands-on activities; few culinary experiences.
4. Outdoor Activities	5 top nature attractions	Few hands-on activities
5. Experiential Accommodation	Cottages by the sea	Campgrounds (50% seasonal, some tired); few heritage inns
6. Major & International Events	Greater Moncton partnership	Slant to urban centres

Key Recommendations

The full report includes an implementation schedule, budget and timeline.

Coordination

1. Set up Regional Coordinating Committee.
Subcommittees: a) Product Development, b) Marketing, c) Education & Training.
2. Ensure coordination resources are in place.
3. Adopt a three year funding plan for the committee.
4. Obtain technical resources for special projects.
5. Adopt benchmarks to measure results.

Partnerships

6. Establish ongoing partnerships with: Greater Moncton, TAP, the Commission du tourisme acadien du Canada atlantique.
7. Foster internal operator partnerships (i.e. Speed Dating Mini Marketplace).

Product Development

8. Establish a Regional Storyline.
9. Develop and strengthen Experiential Products.
10. Develop regional self-guided itineraries and themed routes.
11. Complete GPS mapping for the region.
12. Explore the possibility of establishing an Acadian Coast Biosphere.
13. Trails: Link and map existing trail system.
14. Ensure availability of outdoor activities in key areas.
15. Facilitate development of new tourism experiences that involve the arts sector.
16. Agriculture & Fishing: Work with producers to develop hands-on experiences.
17. Culinary: Bring together local producers and chefs to develop signature dishes and a route.
18. List Festivals and events on website portal; encourage tourism-oriented programming.
19. Work with accommodation operators to encourage technology adoption, upgrades, new experiences, partnering.

Visitor Services and Amenities

20. Ensure regional product knowledge is available at all VICs.
21. Signage: Hwy 11, 15 and 2 linking the Acadian and Fundy Drives throughout the Region; ensure regional and directional signage is in place. – museums, etc.
22. Provide a network of appealing picnic sites and scenic vistas.

Markets and Marketing

23. Conduct marketing research; including a visitor survey every three years (begin in 2010).
24. Positioning: Test and formally adopt a graphic identifier and tag line.
25. Develop a photo image bank.
26. Website Portal: develop a regional tourism portal website.
27. Consumer Promotion: Develop a touring map, tie into TAP programs, ensure ad placement, web site links, and leverage support.
28. Work with travel media and coordinate regional participation in tradeshow and marketplaces.
29. Promote internal regional awareness.
30. Marketing partnerships: position GSE as a complement to Greater Moncton.
31. Proceed cautiously in niche markets.
32. Ensure communication and community awareness throughout the region.

Community Capacity Building/ HR/Training

33. Technology capacity: Encourage operators to adopt transactional website capacity (e.g. www.tt.com).
34. Tourism operator education/training: Ensure that GSE operators are aware of and have access to appropriate business development resources and training programs offered by ACOA -Tourism Atlantic, TAP and others.
35. Front Line Staff Training: Promote existing education programs targeted at front-line staff (Superhost, e-merit).
36. Ambassador Program: Expand the Tourism Ambassador Pilot Program (Sackville, Cap Pele, Shediac) to a broader network.
37. Market-readiness: Buy into and organize a market readiness programs offered by ACOA-Tourism Atlantic.
38. FAMS: Conduct regional familiarization tours.
39. Cultural Coast Best Practices: Showcase internal best practices.

The top priorities for the next year 2009-2010 are to:

- Set up the coordinating mechanism and coordinator resources.
- Continue building momentum with operators and encourage awareness and cross promotion this summer: Develop and distribute a newsletter to operators (what's new, what's happening) in an electronic format and host a Tourism Ambassador Feature with the local radio station(s) to discover the little tourism gems (added benefit of informing the local population, operators and visitors in the region).
- Conduct a Familiarization (FAM) tour for front line staff throughout the GSE (building on Kent Region Tourism Association and Sackville area FAMs).
- Finalize the tag line for the graphic identifier (test with TAP this summer).
- Develop the regional tourism website portal.
- Develop a downloadable map of the region that identifies key attractions, scenic vistas and picnic spots.
- Conduct two workshops: 1. *Developing Experiences*, and 2. *Partnership Speed-dating*.

1. INTRODUCTION

The South East region of New Brunswick is undeniably one of the most beautiful parts of the Province. With tourism lagging throughout Atlantic Canada, New Brunswick and the Region, Enterprise South East and Enterprise Kent have collaborated to develop a regional tourism strategy for this spectacular area.

This report specifies the goals, objectives and approach used to develop the strategy. Then the tourism products and markets are analysed. Based on this analysis, the report makes several recommendations to move the Region forward.

The Steering Committee that guided the strategy is shown in **Appendix A**.



2. GOALS and OBJECTIVES

The purpose of this Strategy is to position the Greater South East New Brunswick Region as a successful regional tourist destination with a focus on building:

- *A cluster of unique and appealing multi-season tourism products and experiences.*
- *Strong positioning and coordinated marketing to reach key target markets.*
- *Effective implementation capacity with strong industry leadership and partnerships.*

Specific objectives are to:

1. Provide a GSE Region **tourism product/experience inventory** and classify products (attractions, activities and events) using a clustered approach (culture, heritage, nature) and also include an assessment of tourism amenities and services (i.e. visitor information centres, signage, accommodations, food service)
2. Identify **tourism product and market trends** relevant to Tourism South East NB and expectations for future industry performance.

3. Specify the market-driven **product development opportunities** for the South East Region as well as gaps and potential entrepreneurial opportunities with a focus on extending the season.
4. Specify the **general and niche markets** that best match existing and potential products/experiences (product/market match).
5. Provide a **coordinated marketing strategy** to effectively target these markets, position and brand the South East Region as a primary tourist destination area (that complements both Provincial and Greater Moncton approaches).
6. Identify the **links and partnerships to develop in order to mobilize organizational support** required to assist the key tourism stakeholders and industry leaders in implementing the new regional strategy and to build sector capacity at all levels including Federal, Provincial, Municipal and Regional stakeholders.
7. Provide an overall **implementation plan** for a sustainable tourism strategy that includes: a) stakeholder roles, b) timelines, and c) estimated costs for rolling out the strategy over the next three years.

3. THE SITUATION

3.1 The Tourism Context

Atlantic and New Brunswick

There is no question about the importance of tourism to Atlantic Canada (**Table 1**). These figures translate to each Maritime province, with the sector 5th in importance in New Brunswick.

Table 1: Atlantic Canada Tourism Overview -- 2008

In 2008, tourism generated:

- Visitors 5.0 million (compared to 5.3 million in 2007)
- Visitor Spending \$3.29 billion (compared to \$3.24 billion in 2007)
- Sales taxes \$450 million
- Jobs for Atlantic Canadians 110,000
- Contribution to Regional GDP 5.5% (vs. 2.5% nationally)

• As an industry sector, tourism ranks:

- 2nd in PEI
- 4th in NL
- 5th in NB, and
- 6th in NS.

• **Tourism Indicators 2008**

→ 2-3% decrease in visitation → 2-3% increase in revenues

• **Gains**

- Canadian arrivals
- Overseas arrivals
- Urban tourism
- Cruise Ships
- Air Travel

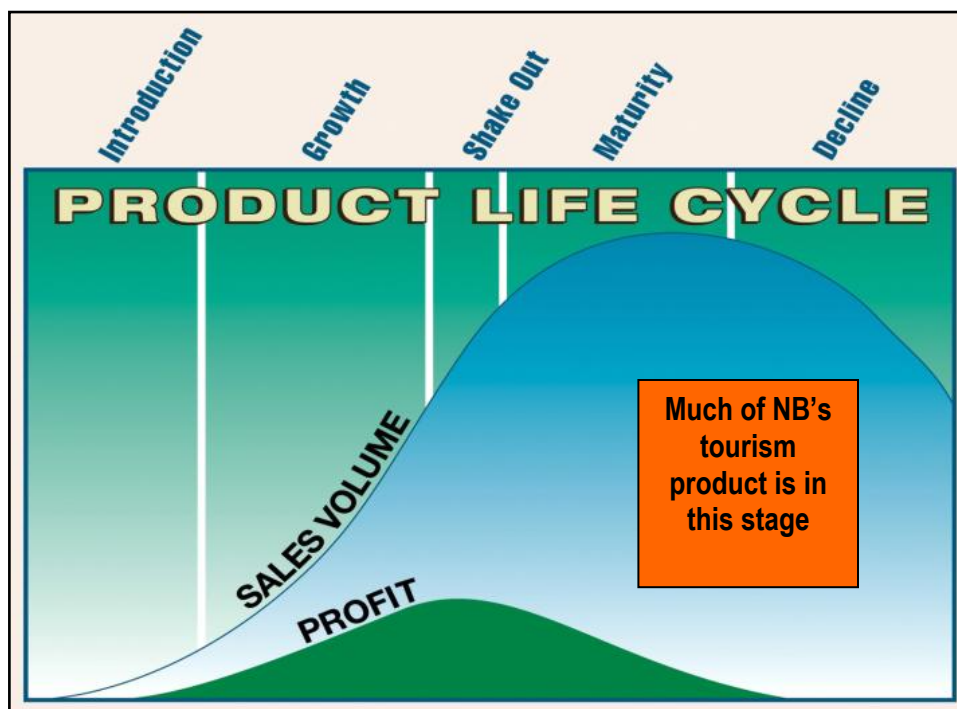
• **Losses**

- US Arrivals
- Auto/RV visitors
- Rural tourism
- Motorcoach

(ACOA - Tourism Atlantic, April 2009)

- Throughout Atlantic Canada and New Brunswick, we are lagging in several key areas for tourism provision.
 - Adoption of tourism technologies
 - Reinvestment in tourism infrastructure
 - Investment in business skills/training
 - Professionalism
 - Adoption of interactive /engaging experiences
 - Access to information, research
 - Vision for tourism
 - In 2007, tourism generated an estimated \$1.2 billion (New Brunswick Tourism and Parks, 2008) and received over 1.5 million non-resident visitors.
 - From 2002-2008, tourism in New Brunswick has decreased by 22% in visitation but has had a 2% increase in spending. Therefore, numbers have dropped but yield has remained the same.
- New Brunswick had a 1% drop in occupancy rates in 2008 (grew 1% in PEI and remained unchanged in Quebec and Nova Scotia).
- Traffic volumes at every road corridor into New Brunswick fell in 2008; there was no new business.
 - Tourism in New Brunswick, including the South East Region, follows the trends of other Maritime destinations – we are in the **decline stage** of the tourism product life cycle (**Figure 1**).

Figure 1: Tourism Product Life Cycle



The GSE Region

This broad area covers the territories of Enterprise Kent (Kent County Region) and Enterprise South East (Westmorland excluding Greater Moncton), which includes 13 municipalities (see below) with many tourism development and marketing projects. There are two main tourism associations, Kent Region Tourism Association and South East Tantramar Tourism Association.

Municipalities within the GSE Region

<ul style="list-style-type: none"> • Rogersville • Saint-Louis-de-Kent • Richibucto 	<ul style="list-style-type: none"> • Rexton • Bouctouche • Saint-Antoine 	<ul style="list-style-type: none"> • Shediac • Cap-Pelé • Beaubassin-Est 	<ul style="list-style-type: none"> • Port Elgin • Dorchester • Memramcook • Sackville
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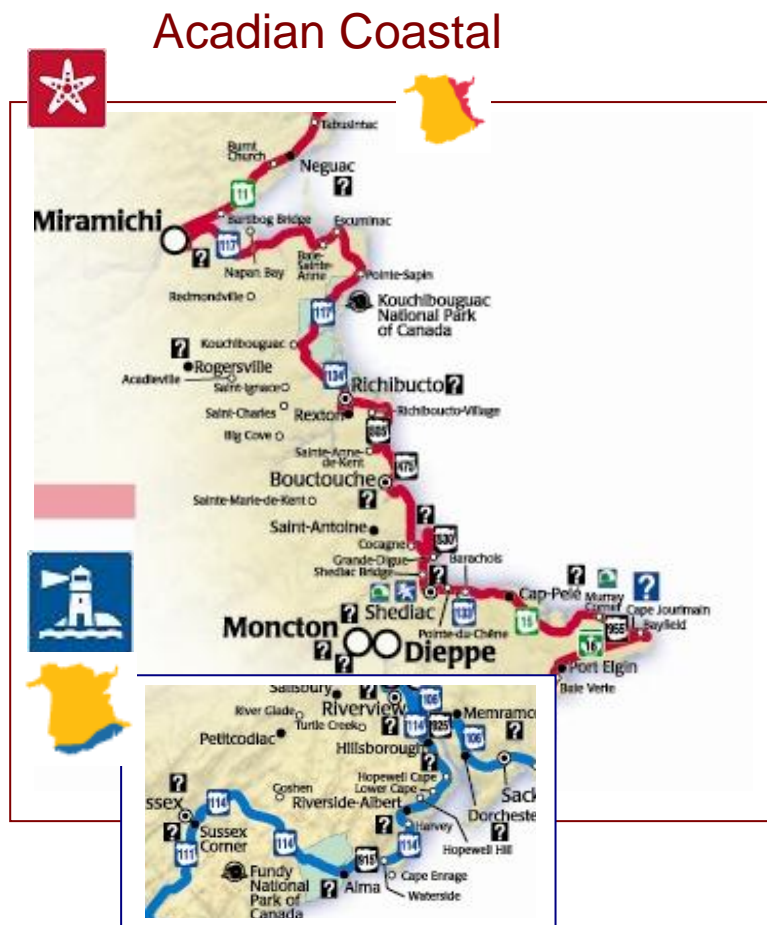
- The Greater South East NB Region has many unique cultural, historical and natural attributes upon which to build. There are many tourism sites, services and experiences with interesting stories and value-added products. The GSE Region boasts several top Provincial attractions and events. The broad tourism Region is shown in **Figure 2**.
- South Eastern New Brunswick has long been one of the most popular tourism destination areas in the province with its spectacular coastline of warm beaches along the Northumberland Strait and magnificent marshes of the Tantramar. As the leading Provincial beach tourism destination, the Greater South Eastern (GSE) Region continues to receive high visitation throughout the summer months.
- South Eastern New Brunswick also benefits from another unique coastal eco-system -- the Bay of Fundy marshes and Tintamarre National Wildlife Area are part of the newly designated Fundy UNESCO Biosphere Area (2007).

3.2 The Key Challenge

Creating a Destination Area for Greater South East New Brunswick

- The Greater South East Tourism Region is strategically located in the central hub area of Greater Moncton and truly is the NB gateway to the other Maritime Provinces, with unique connecting points to both PEI (Confederation Bridge) and Nova Scotia (Aulac). (**Figure 2**).
- Many synergies can be created within the area and with other neighboring areas such as Greater Moncton, the Bay of Fundy the Miramichi and the Acadian Peninsula.

Figure 2: The Greater South East Tourism Region – Strategic Location on Two Provincial Drives



The goal in bringing together the two CEDA territories – Enterprise Kent and Enterprise South East -- and two sections of different scenic drives into one broader tourism destination area -- is to create a unique and dynamic tourism destination, with strong experiential products and effective market positioning that can transcend administrative borders to reach target visitors.

Fundy Coastal

3.3 Coming Together as a Tourism Region

There are many benefits and challenges to promoting the Greater South East Region as a broader tourism destination. It is important for tourism stakeholders to adopt a common regional vision and create strong partnerships within the entire region while considering strengths, weaknesses, opportunities and threats (SWOT) noted in **Table 2**.

Table 2: SWOT of Coming Together as a Single Tourism Region

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Strong tourism product base and varied assets, (lead/supporting/sustaining draws), especially in nature and culture. • Some communities and operators already partnering (internal and external); many are working with Greater Moncton” • Active tourism associations and groups with strong volunteers (Kent Region Tourism Association, South East Tantramar Tourism Association, Tri-community tourism project: Rexton, Richibucto and Saint-Louis). 	<ul style="list-style-type: none"> • Limited resources for marketing or product development. • No existing regional coordination mechanism. • Lack of product knowledge across the region due to size and industry fragmentation. • Limited regional cross-promotion. • Operators have limited resources to support regional industry development.
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Attractive and marketable region with several product clustering opportunities. • Interest in moving toward more collaboration: Enterprise Agencies, municipalities, attractions, tourism associations and other operators. • Enterprise South East & Enterprise Kent have joined together to support the tourism development process and are committed to helping find resources for the implementation of the new regional tourism strategy. • Working together reduces overlap and duplication of efforts, facilitates the process of mobilizing resources for both product development and marketing. • Bringing down borders enhances opportunities for regional tourism product awareness and cross-promotion. 	<ul style="list-style-type: none"> • Communities and individuals tend to work in silos due to perceived competition or <i>esprit de clocher</i> (lack of collaboration, lack of awareness, language barriers, etc.). The question: Will people make a real effort to reap the benefits of working together? • Fear of competing for already scarce resources – a view that working regionally will take away from the local initiatives. • Operators are struggling to develop viable tourism businesses, which affects sector capacity. • Difficult to mobilize leadership due to limited resources (time, dollars) for both business reinvestment and regional initiatives (and to grow the sector). • Concerns about adding another layer to an already fragmented sector.

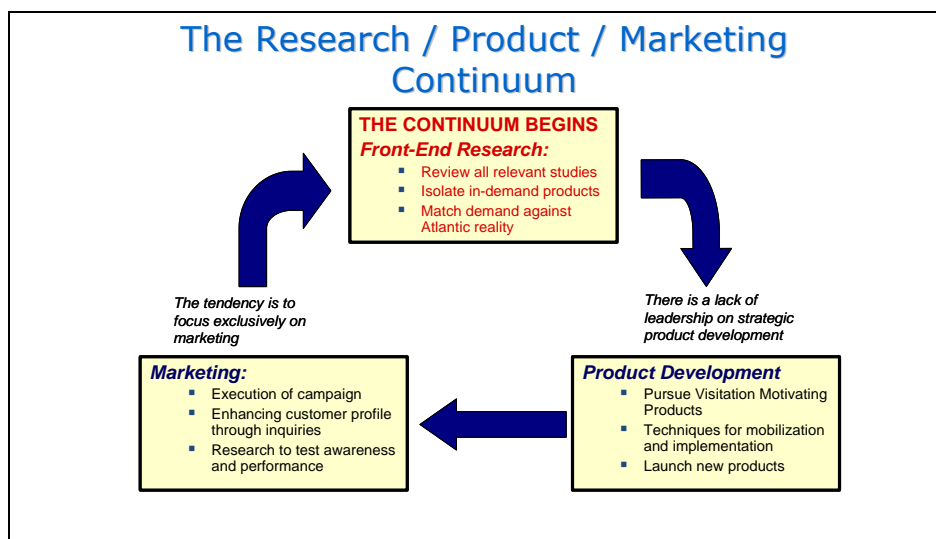
3.4 Atlantic and Provincial Tourism Approaches -- 2009

One of the foundations of the strategy is the Research/Product/Marketing Continuum (RPM). The **Research/Product/Marketing Continuum** is a never-ending process of investigation, invention and intervention (**Figure 3**). All three elements (research, product and marketing) must work in concert to achieve optimum results.

The Continuum illustration highlights that tourism operators and organizations often leap-frog from research to marketing without thinking the product challenge through.

Research drives → Product which drives → Marketing which drives → Demand

Figure 3:



Source: ACOA-Tourism Atlantic, 2008, 2001.

3.4.1 Challenges to Tourism Development in Atlantic Canada

Over and above our lack of adherence to the above model, ACOA cites several challenges to tourism development in Atlantic Canada in its 2009 tourism strategy. All of these transfer to South Eastern New Brunswick.

- Seasonality
- Accessibility
- Shift in the Urban vs. Rural Visitation Mix
- Technology
- Sustainable and Environmentally Positive Tourism Practices
- Lack of Industry Cooperation & Vision

This strategy aims to overcome these challenges.

3.4.2 New Brunswick Product Development Themes

The product development focus within the new Provincial strategy (April 2009) is **Inner Journeys**. It is based on personal enrichment and well-being, and consists of an experience collection that appeals to mainstream markets and focuses on the themes in **Table 3**.

Clearly, the South East NB tourism strategy must tie into these themes with a coordinated product and market focus.

Table 3: New Brunswick *Inner Journeys* Product Development Themes (April 2009)

- **Challenge** - safe adventures and the physical involvement of consumers.
- **Child's Play** - fun experiences for children, adults or both.
- **Comfort and Contemplation** - personal enrichment through specialized accommodations and educational exposure to natural wonders.
- **Cuisine** - food service operations offering interactive experiences and / or menus with a focus on New Brunswick products.
- **Cultures and Customs** - interactive involvement and exposure to our history, heritage, music, storytelling and traditions.
- **Celebration** - events, festivals and activities that exemplify the joyfulness of being in New Brunswick.

3.5 Tourism Trends

Today, globally competitive, high-yield, unique tourism products and experiences are required to attract high-yield visitors. Today's travellers are increasingly sophisticated; 60% enjoy being close to nature and almost half do things impulsively. More people are seeking dynamic, innovative travel experiences. A summary of tourism trends and their relevance to the GSE Region is presented in **Tables 4 and 5**.

Table 4: Tourism Trends and Their Relevance to GSE NB

The Globalization of Tourism	Relevance to GSE NB Region
Global recession, weakened economy	Less discretionary income for travel.
High fuel prices	Potential for less travel to further places.
The realization of governments around the world of the economic impact tourism can have (foreign direct investment, job creation, social and economic development, etc.)	The Greater South East wishes to take advantage of the positive impacts of tourism.
Emerging countries as new travel destinations	Everyone is in the game – increased competition.
The adoption and use of technology in research and booking vacations	Web presence is not enough; operators must have the ability to book and transact on the web. Regional sites need to be mapped using GPS.
Increased use of partnerships to reach markets and develop products	Need for municipalities, funding agencies, private sector to work together.
Changing Consumer Behaviours & Interests	Relevance to GSE NB Region
Urban tourism is increasing; rural tourism is declining	GSE Region needs to align itself with Greater Moncton as a complementary destination.
Demographic trends: the boomers versus generation X&Y travelers and the travel behaviours and interests; multi generational family vacations	South East NB experiences must have dual appeals.
Increase in demand for authentic, experiential, themed tourism products	GSE NB needs to develop more experiential products or risk continued decline of the destination life cycle.
Increase in demand for customized and DIY (<i>do it yourself</i>) packaging etc.	Web-based, self-guided itineraries and interactive websites becomes critical.
Canada and AC	Relevance to GSE NB Region
Increase in competitive pricing and where Atlantic Canada fits in terms of perception value	Atlantic Canada perceived as "poor value" for dollar spent.
Tourism stagnant or declining; repeat visits up 60% in NB; new visits down	Ensure that current visitors are satisfied with visits; provide opportunities to obtain visitor feedback (research).
Aging infrastructure	Less appealing products (in the face of competition).
VIC visits declining	Relative shift in resources to on-line.
Labour market shortage	Need to appeal to youth market as a great place to work (SE NB); internal training in region important.
Strong cruise industry growth	Potential to capitalize on this for Pointe-du-Chêne (small cruises).
Decline in US travel to Canada	Partner with province and Greater Moncton to reach nearby US markets; focus on domestic.

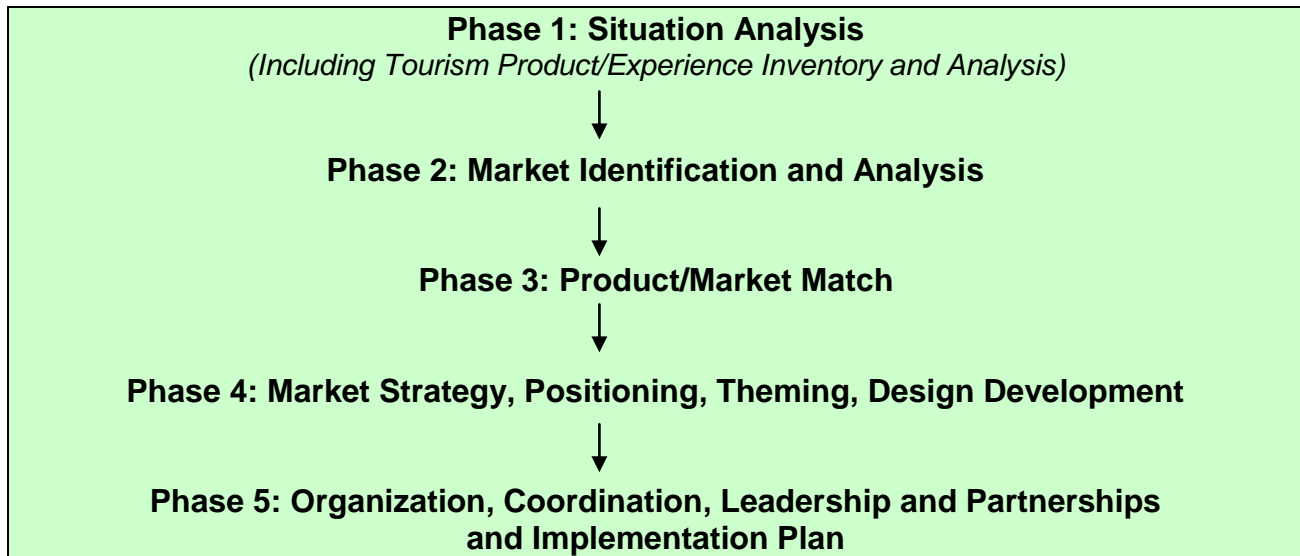
Table 5: Marketing and Product Related Tourism Trends

Marketing-Related	Relevance to GSE NB Region
Underfunded tourism promotion	Need to be constantly seeking ways to fund marketing. "Pay to play" is the rule of thumb.
More targeted marketing; Increased segmentation – more niche marketing	Need to better define and pinpoint markets.
The On-line trend (TAP, 2008)	
➤ 80% of North American travellers go on-line to search; search engines used by 90%	Identification of key search words used by consumers is critical, as is connection to the Greater South East brand and products.
➤ 63% say on-line travel influenced travel decisions.	The need for managed "blogs" and amazing, transactional websites.
➤ 60% do search and select based on the word "experience"	Experiential focus needed
➤ 4 out of 10 Internet users in Canada visit on-line social networks.	Bad experiences can be communicated immediately; need positive presence on social networks.
Product-Related	Relevance to GSE NB Region
"Experiential" products are key	Hands-on, interactive, memorable experiences need to be developed and strengthened. Kouchibouguac has strong experiential expertise.
Growing interest in culture and heritage (e.g. events, theatre, festivals, museums, art galleries, and heritage attractions).	Elements of l'Acadie and special events need to be consolidated and highlighted; Museums need experiential aspects; artist studios, galleries and classes need emphasis.
Designations important	e.g. UNESCO Biosphere = World class; National Parks = Kouchibouguac; Canada Select, HR certifications should all be a focus.
Need to meet consumer expectations → value proposition must be there	Seek ways of adding value to tourism product.
Culinary – slow food; 100 mile diet; local food.	Few restaurants focus on local food or experiences.
Green trend – consumers tendency to purchase green; recycling a must	Continue the greening trend (e.g. Cap Pelé, Sackville, Bouctouche)

4. METHODOLOGY

The approach involved leading the Greater South East tourism industry through a process that creates ***synergy between among tourism stakeholders resulting in a*** road map to a vibrant tourism destination.

Figure 4: The Tourism Strategy Development Process



4.1 Tourism Product/Experience Inventory and Analysis

Involved updating, classifying, clustering and analysing existing tourism products in the Region.

- a) Developed framework and criteria to categorize products/experiences as lead, supporting and sustaining attractions with special emphasis on the following products/experiences:
 1. Nature based product, 2. Culture and heritage, 3. Cruise ships and tours, 4. Attractions, Festivals and events, 5. Services and amenities.
- a) Inventoried and mapped tourism assets by potential product/experience clusters (e.g. culture, heritage, nature). Included attractions, amenities and services – VICs, signage, accommodations, restaurants and other relevant sites.
- c) Reviewed: Visitor guides, websites, plans.
- d) Explored potential for cruise ship visitation at Pointe-du-Chêne.

Figure 5: Market Information Sources

4.2 Primary Information Sources

- On-site visits throughout the region.
- Stakeholder interviews with 30 tourism stakeholders, including members of the Steering Committee.
- Three rounds of stakeholder sessions to provide status reports and obtain input:
 - Launch of consultation process (Grande Digue: January),
 - Session 1 in three locations (Richibucto, Sackville, Shediac; February) to obtain input from stakeholders, review inventory and SWOT; Session 2 (Grand Digue; March).
- Meetings with representatives from the NB Department of Tourism and Parks (TAP) the Commission du tourisme acadien du Canada atlantique (CTACA), City of Greater Moncton Tourism Department, Enterprise Agencies (Kent and South East), many attractions and municipalities throughout the region.

4.3 Secondary Information Sources

- a) Existing information on regional, provincial, national and international trends and how this information relates to the Greater South East Region;
- b) New Brunswick Tourism and Parks newly developed strategic plan and product development strategy (to ensure complementary approaches).
- c) Regional development plans and projects, including:
 - Enterprise Kent & Enterprise South East: regional strategic plans and priorities;
 - Municipalities and communities: strategic priorities related to tourism development and marketing including regrouping various stakeholders by regions;
 - Regional Tourism Associations (Kent, Tantramar): structure, mandate and projects;
 - Key Tourism Stakeholders: Attractions, tourism operators (accommodations, restaurants, other activities).
 - Other Tourism-related Organizations and Departments: that can offer support and resources in product and / or marketing development: TIANB, CTACA, Parks Canada, Heritage Canada, The Greater Moncton Tourism Partners, ACOA & ACTP
 - Key strategies and proposed projects: in various related tourism offerings such as the South East Agritourism Strategy, the *Célébrons nos Quais* pilot project, Fundy UNESCO Biosphere, and other individual projects.
 - Web and telephone research to develop a case study -- comparison of the GSE Region with two other similar beach type destinations: 1. Old Orchard, and 2. Cavendish.

4.4 Graphic Treatment

In order to develop a design for the region, several tasks were undertaken, including:

- Consideration of markets visiting the Region.
- A focus on the Visitation Motivators to Atlantic Canada.
- The region's key features and clustered product inventory.
- Incorporation of themes identified by Stakeholder groups in Session 1.
- A review current print and electronic promotional material used by the Province, Greater Moncton and tourism groups in the Region.

5. RESULTS

5.1 Product SWOT and Clustering

The Region has some strong nature and culture tourism products, but also areas of weakness. These features lead to several opportunities and threats (SWOT) as shown in **Table 6**.

Table 6: GSE Tourism Product SWOT

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Strategic location: Near a major urban centre (Greater Moncton) and Gateway from Nova Scotia and PEI. • Long tourism tradition, especially as beach destination. • Rich history throughout the area, including Acadian culture. • Many top tourism products in NB, including natural and cultural attractions. • Rich agricultural and seafood/fisheries region. • Strong arts community. 	<ul style="list-style-type: none"> • Region perceived as mainly a summer destination. • Lack of experiential products (hands on, things to do, touch, see, smell, taste). • Some tired products (accommodations, cuisine, museums). • Directional and information signage is an issue (Hwys 2, 11, 15). • Lack of access to a coordinated source of off season visitor information, when the VIC's are closed. • No virtual presence as a destination; only a few basic links on individual sites within the region.
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Need to weave the story, linking history and heritage through the entire Region (e.g. Acadian linkages, farming, fisheries, transportation). • Diversity/range of beach product (discovery and swimming). • Acadie & Fundy, the two most popular scenic drives in the province. • Agritourism movement offers new experiences. • Local culinary products to be developed into tourism experiences. • Trans Canada and NB Trails – links and mapping. • Develop regional touring routes and itineraries that link products and experiences. • Link Marinas and wharves (activities & events). 	<ul style="list-style-type: none"> • Declining tourism numbers and economic outlook. • People wary of working together. • Operators have limited resources for product upgrades. • Labour shortage (esp. during off season) and limited training for tourism staff, business and management skills. • Lack of proper resources required to support the overall coordination of volunteer efforts in tourism development.

5.1.1 Tourism Product/Experience Inventory and Analysis

A tourism product-positioning framework was developed for the Greater South East Region and the products/experiences were categorized: a) into five major clusters as outlined on the following page and b) based on their ability to draw travellers as defined in the categories below in **Table 7**.

Table 7: Greater South East Tourism Product Draw Categories

1. **LEAD** category is reserved for our “cultural icons”. These are the marquee attractions and experiences that are/have:
 - *Well developed*
 - *High quality*
 - *Well interpreted*
 - *A “wow” factor (usually)*
 - *High standards of visitor service*
 - *Prominence in the tourism marketplace (as a general rule)*
2. **SUPPORTING** category is designed for attractions and experiences that are/have:
 - *Less developed than those in the lead category (usually)*
 - *Good or acceptable level of quality*
 - *Good or acceptable level of interpretation*
 - *Without the “wow” factor of those in the lead category (usually)*
 - *Good or acceptable visitor service standards*
 - *Less prominence in the tourism marketplace than those in the lead category (as a general rule)*
3. **SUSTAINING** category is meant for smaller community attractions and experiences that are what we might call “tiny jewels”. These tiny jewels have:
 - *A visitor experience that is more limited in size or scope than those found in the supporting or lead categories*
 - *Good or acceptable level of quality*
 - *Good or acceptable level of interpretation*
 - *Comparatively low standards of visitor service (although not necessarily)*
 - *Sometimes “diamonds in the rough”*
4. **UNDEVELOPED** experiences waiting to be developed.... (e.g. “latent” resources) and can include projects in various stages of development:
 - *Underway (under construction)*
 - *Being planned (planned but not started)*
 - *To be developed (to explore concept and details)*

5.1.2 The Product Experience Clusters

The Experience Categories are regrouped into five experience clusters that consider product authenticity and market readiness as well as key motivators for travel to Greater South East NB:

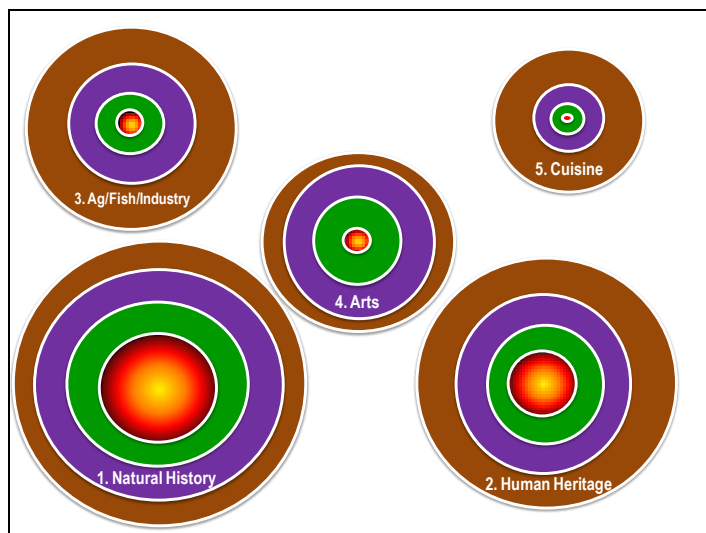
Figure 6: Product Experience Cluster Framework



5.1.3 The Greater South East New Brunswick Destination Typology

The Greater South East Region presents varied levels of product clusters as shown in **Figure 7**. The size and scope of each cluster represents its prominence in the Region. The inner circles show the relative importance of lead products surrounded by the supporting and sustaining products, with the outer circle as the undeveloped category. **Figures 7 to 12** provide a more detailed outline of each of the five tourism product experience clusters in order by their relative importance.

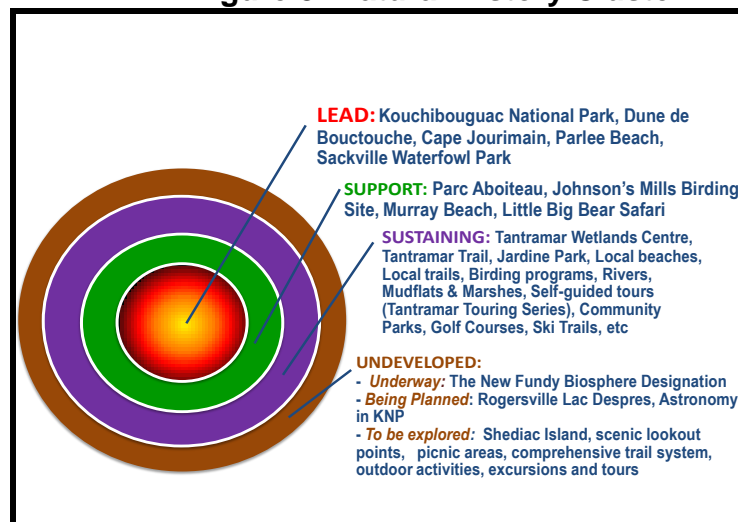
Figure 7: The GSE Tourism South East Destination Typology



1. Natural History Cluster

This is the strongest cluster. There is a critical mass of both lead and supporting attractions, with many demand generators recognized among the top attractions in New Brunswick. There are sustaining resources in many of the local communities although there is a limited base of outdoor activity operators.

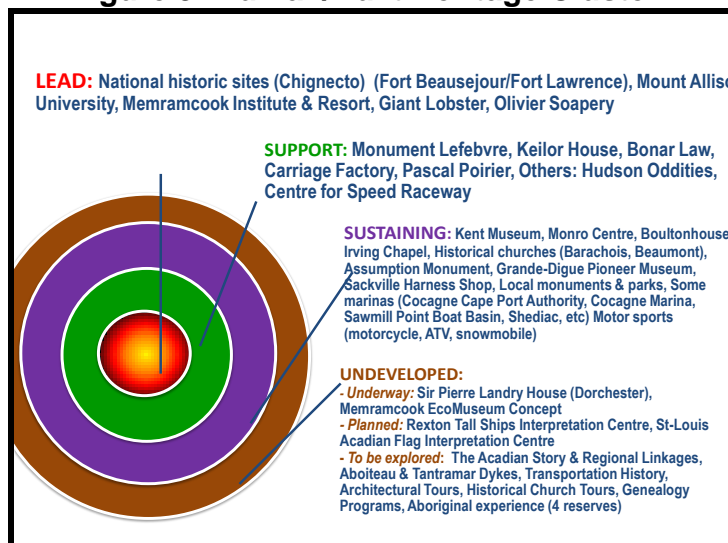
Figure 8: Natural History Cluster



2. Human/Built Heritage Cluster

This is the second strongest cluster. Lead products in this category tend to be smaller in scale and more fragmented than those in the Nature cluster, in terms of an overall theme. The support and sustaining categories are more oriented toward history and have potential for strong links throughout the region.

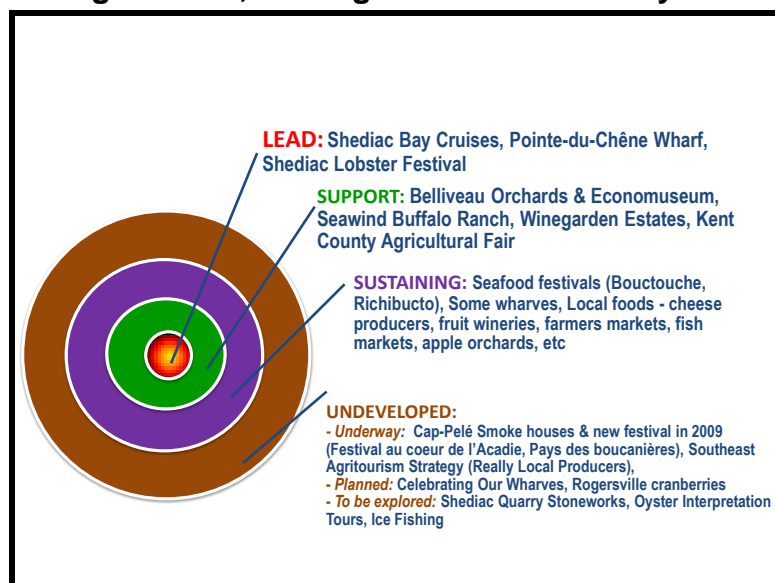
Figure 9: Human/Built Heritage Cluster



3. Agriculture, Fishery & Industrial History Cluster

This cluster has very few leads, with most located in the Shediac area. The support and sustaining products have developed more tourism-oriented experiences in recent years. The undeveloped category offers potential if champions can be found to develop these products and bring them to market (e.g. smoked herring and ice fishing).

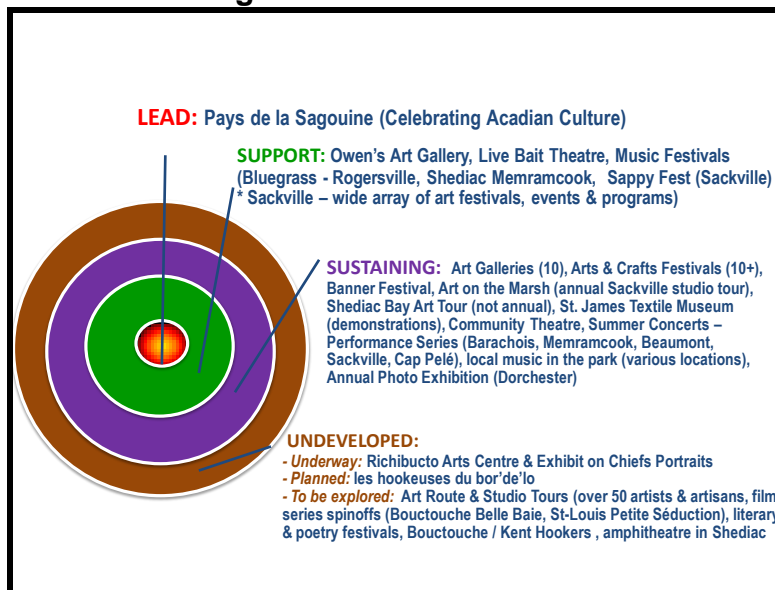
Figure 10: Agriculture, Fishing & Industrial History Cluster



4. The Arts Cluster

Le Pays de la Sagouine is the only lead in this category but there is a certain critical mass of support and sustaining products, particularly in the visual arts. These tend to be more dependent on volunteer groups and not-for-profit organizations. This sector presents several opportunities with many latent resources, requiring leadership and concerted development efforts.

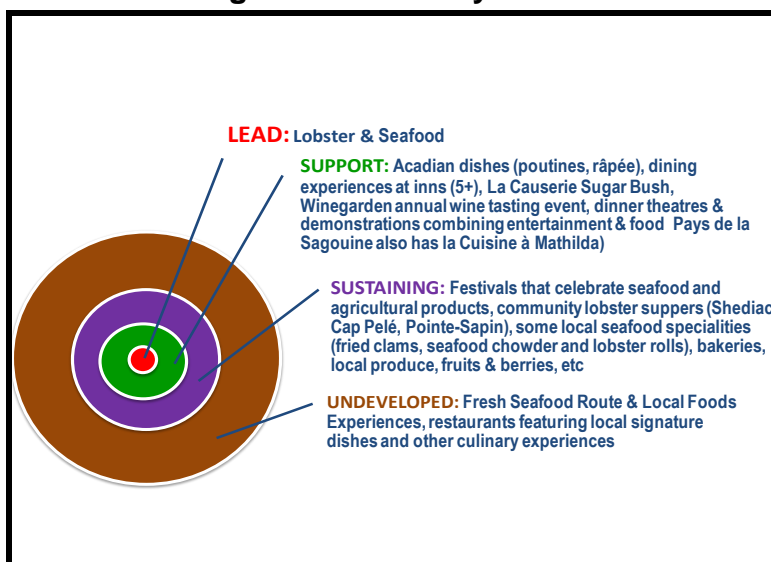
Figure 11: The Arts Cluster



2. The Culinary Cluster

The Greater South East Region has a strong fisheries and agriculture base with excellent local products, offering many possibilities for culinary experiences and linking with the agriculture and fishing cluster.

Figure 12: Culinary Cluster



5.2 Product Summary

- **Over 300 tourism operators**
- **Strong “lead” natural attractions.**
- **Strong human/built heritage (but story not told), with emphasis on Acadian culture.**
- **Arts Sector is building and has experiential opportunities.**
- **Agriculture and fishery links need to be highlighted.**
- **Culinary needs strengthening and linkages to locally produced agriculture and fish.**
- **Limited hands-on experiences**

5.2.1 Lead Products (Demand Generators)

Parlee Beach is still the most popular attraction in the province, receiving over 300,000 annual visitors (TAP 2006). During the past 12 years, other types of beach products have been developed to showcase coastal discovery areas through high quality facilities and interpretation programs such as the Irving Eco-Centre and Cape Jourimain. Kouchibouguac National Park is a well-established site that also offers a dune swimming experience in addition to a range of outdoor activities.

Visitation for lead products is shown in **Table 8**.

Table 8: Visitation for Lead Products

Major Attractions	Period of Operation	2006	2007	2008
		(from May to Sept/Oct only)		
LEAD				
Pays de la Sagouine	June - Sept	65,797	60,915	52,306
Irving Eco-Centre (dune)	Year-Round	104,631	98,690	116,858
Kouchibouguac National Park	Year-Round	166,846	135,652	113,858
Olivier Soapery	Year-Round	30,274	30,652	38,078
Parlee Beach	June – Sept	323,751	380,791	300,000 +
Cape Jourimain		95,000	90,000	86,000
Mount Allison (Conferences)		10,000 +	10,000 +	13,623
Fort Beauséjour – Fort St-Lawrence Historic Site	June – Sept	23,484	23,556	22,561

5.2.2 Festivals and Events

There are about 75 festivals throughout the region, particularly during the summer months. Many communities offer weekly concerts and amateur music for the general public in community parks, indoor venues and in historic churches. Professional performances are held during different times of the year including off season and year round performances, including Le Pays de la Sagouine, the Mount Allison Performing Arts Series, Monument Lefebvre/Memramcook. There is a growing interest in Bluegrass music, especially in Memramcook and Rogersville.

Almost every community and many attractions organize some type of yearly celebration around Canada Day, NB Day and Acadian Day. Food events in festivals around seafood remain popular. The Shediac Lobster Festival is over 60 years old and it is the only signature festival listed in the provincial tourism inventory. Traditional fairs are still held in Sainte-Marie and Port Elgin. Emerging festivals tend to focus on environmental themes. Since 2008, le Pays de la Sagouine has featured a few community days in their programming on Sundays (e.g. In 2008: Rogersville, Richibucto, Ste-Anne-de-Kent, 2009: Memramcook, St-Louis-de-Kent, Bouctouche).

Food fairs and community lobster suppers abound during the summer months. There is a renewed interest in winter activities, with winter carnivals, outdoor rinks, ski trails, local ice fishing in many communities.

The challenge is that there are too many Festival listings (an estimated 12 different publications). Visitors need information in once source, preferably online.

5.2.3 Accommodations

There are about 81 fixed roof accommodations in the Region with 733 units. There are 31 campgrounds in the region, with approximately 3,740 sites, of which 50% of these are seasonal.

The occupancy for the Region as compared to NB cities is shown in **Table 9**. In 2008, rural occupancy rates were up by 7% while urban occupancies were up 11%. Annual occupancies in South East New Brunswick are among the lowest in the province ranging from 31% to 43%.

- In both 2007 and 2008 Greater Moncton continued to be the highest performing city or tourist region east of Montreal.
- The fixed roof accommodation plant is tired and some of the campgrounds have not kept pace with the times. This follows a general pattern throughout New Brunswick.
- There are a few bright spots in the accommodation sector with a fair number of higher end properties in the B&B and country/heritage inns in various locations. There seems to be a growing interest with inn keepers to offer well prepared local foods by chefs on site.

Table 9: GSE Occupancy Rates 2006-2008

Greater SE NB	2006	2007	2008
Greater Moncton to NS & PEI Borders	41%	43%	43%
Shediac to Cape Tormentine	37%	40%	37%
Miramichi to Greater Moncton	31%	30%	31%
NB Cities (shown for comparison purposes)			
Greater Moncton	63%	62%	60%
Fredericton	59%	61%	61%
Saint John	56%	61%	59%
Edmundston	47%	48%	39%

5.2.4 Visitor Services and Amenities

• Food service: Over 75 establishments

The food service in the Greater South East is diverse with a range of fast food, seafood, family, franchises and fine dining options. There is a fair number that are seasonal operations, particularly with seafood.

There is a higher concentration of food service establishments in the Shediac Region, with recent renovations and additions of new menus, including resto-bars and coffee houses.

Several regions offer Acadian food products: in a few restaurants, including main dishes as well as desserts. Le Pays de la Sagouine offers several dinner theatres and a hands-on culinary experience to visitors on the island with la t'cuisine à Mathilda. Several bakeries throughout the region offer interesting varieties of traditional Acadian desserts, such as la poutine à trou and pets-de-soeur.

There are many possibilities of offering fresh local food products with the Farmers' Markets and farm stands, U-picks, apple orchards, wineries, sugar bushes and fish markets.

• Visitor Information Centres (VIC's)

There is one provincial VIC in Aulac as the gateway from Nova Scotia; however it has limited visibility since the highway changes a few years ago. This provincial receives approximately 17,000 to 20,000 visitors per year (2006 – 2008). Cape Jourimain is the other key entry point at the PEI border.

There are several seasonally operated municipal visitor information centres in the region: Shediac, Bouctouche, Cap-Pelé, Richibucto, Rogersville, Dorchester, and Sackville. Municipalities spend considerable time and effort to set up, maintain and run their VIC's. Some have permanent season resources to operate their centres. A few have added interpretative displays.

The major attractions also have information centres within their facilities, such as Kouchibouguac National Park, the Irving Eco-Centre, Parlee Beach and Cape Jourimain.

• Signage

There are many levels of signage that need to be considered in the accessibility of a destination area, including directional, community, operator levels. In such a large area as the Greater South East, directional signage is critical in guiding the visitors to communities. Three major highways (11 – North – South through Kent, Highways 2 & 15, from Moncton to Nova Scotia and to PEI) run through the South East Region and by-pass several communities, which can add to general confusion. A few communities and major attractions have put up large signs on major routes running through their areas.

New Scenic Drive indicators are being installed by the province. The challenge remains to link the Upper (Eastern) Fundy region of the drive (Memramcook, Sackville, Dorchester) to the popular lower sections that include Fundy National Park and the Fundy Parkway that is under construction. Greater Moncton further divides this Scenic Drive affecting visitor flow. There are long term plans to connect the trails from Dieppe to Memramcook through the Fundy UNESCO Biosphere project.

Aulac, as the “gateway” information area to New Brunswick -- and as the connecting point for the two most popular scenic drives in the province – is not well signed, unappealing and frequently by-passed as it is not easily accessed. Even the entrance to Fort Beauséjour is difficult to find.

It is a challenge for both operators and economic development agencies to work with the current regulations and lobbying and partnerships are needed to change regulations and improve signs in the rural communities. While the largest challenge is to link the Kent and South East territories as much as possible through signage it is more easily done through mapping and internet promotion.

● Network of Picnic Areas, Scenic Vistas

Many communities have developed community parks and picnic areas. As a broad region, it is worthwhile to promote the various sites as a linked network of quality picnic spots. This could be tied into fresh local produce, fresh seafood and local wines. A few sites have public BBQ's for visitor use.

There is an opportunity for culinary supplies (or experiences) to enhance the visitor's experience (packed lunches, vouchers for signature dishes throughout the region). This approach is a way to encourage visitors to learn more about the communities and discover locally available products.

Scenic vistas and by-ways enhance the range of coastal viewing experiences and should be mapped and promoted.

Many communities have developed local trails and have plans to complete a larger network and to connect with neighbouring communities. Many of these link to the NB and Trans Canada Trails, offering another opportunity for mapping.

● Pointe-du-Chêne

A SWOT analysis and “port-readiness” assessment of the potential for cruise tourism at Pointe-du-Chêne was conducted and is shown in **Appendix B**. A separate document includes the extent of development necessary for “port readiness” (servicing the cruise market); opportunities that might exist from a cruise line perspective; and recommendations for moving forward with “next steps”.

5.2.5 Other Competing Destinations – Old Orchard and Cavendish

As a comparison with South East New Brunswick, Old Orchard Maine and Cavendish Beach are profiled as case studies. A summary of the major points of comparison is shown in **Table 10**. These are elaborated on in a separate document. It is evident that the GSE Region has a different appeal from the other two, with a focus on nature and culture. The Region also appears to be underpriced where attractions are concerned, but competitive with Cavendish in the accommodation price point category.

Table 10: Major Points of Comparison: GSE, Old Orchard and Cavendish

	GSE NB	Old Orchard	Cavendish
• Focus	Nature, Culture	Family beach resort	Multiple appeals; confusing
• Visitors	About 350,000	2.3 million overnight	223,278 overnight
-Trends	Decreasing	Decreasing	Decreasing
• Markets	Que, Ont, US, Region	Mass, NH, NY, Conn.	Region, Other Cda,US, Intl.
• Main Products	Top Nature Attractions	Theme Parks	Multiple attractions
• Avg. Attraction Price	\$5-10 – adult	\$30-35 – adult	\$19 - adult
• Accommodation (Fixed Roof)	Properties: 81 Units: 733	Properties: 90 Units: 1130	Properties:65+270 Cottages Units: 1223 +
- Avg Price Peak	\$90 - \$120 /night	\$170/night	\$110/night (cottages can go up to \$200/night)
• Campgrounds	Properties: 26 Sites: 3,740 (50% seas.)	Properties: 12 Sites: 3,170	Properties: 16 Sites: 942
- Avg Full Service	\$ 30/night – peak	\$60/night – peak	\$34/night – peak
• Food & Beverage	75 +	40+	24+

5.3 Markets -- Identification and Analysis

As noted in the Situation Analysis, in 2007 (most recent figures), New Brunswick received over 1.5 million non-resident visitors, with expenditures of \$1.2 billion

Of these visitors, it is estimated that:

- 60% travel the Fundy Coastal Drive (the leading drive), and
- 42% travel the Acadian Drive (2nd ranked drive).

New Brunswick has many market challenges that are affecting the industry at all levels and these issues also affect the South East region as well (**Table 11**)

Table 11: New Brunswick Market Challenges

Broad:

- Economic recession
- Fuel costs
- Increasing global competition
- Value of the Canadian dollar
- 2010 Olympics (Vancouver)

NB Specific:

- Lack of destination awareness
- Lack of experiential products and new products; tired products
- Poor 2008 weather

Market information was accessed at three levels: 1. Pan-Atlantic for Atlantic Canada regional data, 2. Provincial for New Brunswick Data, and 3. major attractions and events data augmented this mix, where available. Highlights of this information are shown in the pages that follow. Key market considerations are shown in **Table 12**.

Table 12: Some Key Market Considerations

- While official 2008 NB market numbers have not been released, the year paralleled that of other Maritime markets. The year started well, then fell off mid-year, in concert with the drop in the North American economy.
- **Key markets** for New Brunswick are: Quebec, Ontario, the Atlantic Region, the US (New England) and other International markets.
- **Performance:** External markets are underperforming but the regional market, especially the resident NB market is strong.
- **US travellers** are moving to activity-based, last-minute trips planned on the internet, including niche and learning trips.
- **Quebec markets** are interested in beaches as well as soft adventure, trails, cycling and hiking; they lead Canadian surveys in their interest in sustainable and eco-friendly tourism.

(New Brunswick Tourism and Parks, 2008, 2007)

5.3.1 Who are the Visitors?

a) L'Acadie Markets (Atlantic)

The Commission du tourisme acadien du Canada atlantique (CTACA) identifies the South East tourism region as one of five main Acadian regions in Atlantic Canada. For CTACA, the area includes Bouctouche Shediac, Dieppe, Memramcook and surrounding areas.

CTACA is overtly moving toward an experience-based marketing model and seeking non-Acadian partners as part of the five Acadian experience clusters making up each region. In addition to product development, the mandate of CTACA is to promote these clusters to local, regional, national and international target markets.

Positioning/Brand: While a brand has not been finalized, two that have been posed are “Vacation Acadie” which is favoured over “the Colours of l’Acadie”.

Key target markets are: 1. Quebec, 2. USA, and 3. International. An overview of these markets is shown in **Appendix C**.

b) Fundy and Acadian Drive Market Profiles

While the Fundy and Acadian Drive profiles were developed in 2005, the visitor picture still holds true today (TAP, 2009). A summary of the profiles is shown in **Table 13**.

The more the Greater South East Region can capture visitors to both drives, the better the yield for the region.

- **Fundy Drive** visitors tend to originate more from the US, although undeniably, this market has declined. This Drive also receives a relatively high number of first time visitors and an above average number who will travel to include other Maritime Provinces. A large segment is touring on long trips.
- **Acadian Coastal Drive visitors** are divided into two types: 1. the constantly moving “touring” travellers (typically from Ontario), and 2. the “stay and enjoy” destination vacationers (consider NB and l’Acadie a final destination. Both groups are upscale, take flexible trips and enjoy nature, beaches, other attractions, with high service quality seen as essential.

c) The NB Quebec Market

A snapshot of the Quebec market to New Brunswick is shown in **Table 14**. A high use of the Internet is consistent with other NB markets.

Table 13: Fundy vs. Acadian Drive Profiles (2005)

Variable	Fundy Coast Drive	Acadian Drive
	- the leading drive	- 2nd ranked drive
Leading origin markets		
USA	29%	15%
Ontario	23%	21%
Quebec	20%	42%
Regional (includes NB)	19%	15%
Other	9%	7%
First trip to NB	48%	44%
Returning after Previous year	22%	22%
Travel parties		
Adult couples	44%	44%
Families with children under 18	36%	36%
Accommodations Used		
Hotels or motels	52%	45%
Campgrounds	29%	35%
Inns and B&Bs	17%	17%
Average stay in NB	5.1 Nights	6.3 Nights
Average Expenditure in NB	\$199 per party per day	\$191 per party per day
Total Expenditures while in NB	\$1,060	\$1,196
Key Words (Motivators)	Nature	Nature
	Quality	Quality
		Beaches
		Attractions

Table 14: Quebec Market Highlights

- Quebecers who book travel in advance
 - 22% → 30-59 days
 - 54% → 1-59 days
- 1/3 are camper/caravaners
- 40% are first time visitors
- 50% are families
- 60% of Quebecers use Internet to research travel and plan trips
- NB awareness is high but NB, and not viewed as overly exotic.
(TAP, 2008)

d) Greater Moncton Tourism Market Growth: A 2008 Good News Story

- Amidst a flat market in 2008, Greater Moncton had strong tourism numbers:
 - Expenditures: \$376 (6% growth to a new all-time high), with majority of spending by NB residents.
 - Visitation: 2.2 million (5% growth), with just under half staying overnight.
 - Room sales: grew 6% (even with a 25% increase in room capacity).

- Greater Moncton has drawing power for NB residents (overnight stays), with 13% growth in this market, representing about half of Greater Moncton visitors.
- July, once the prime season is now low. July occupancy dropped to just 67% in 2008, from a high of 83% provincially and 93% in Metro Greater Moncton in 1999. This is the lowest since the early 1980's. Last July also saw cold weather and record high gas prices.
- Greater Moncton excels in the areas of: 1. events (e.g. Atlantic Nationals Automotive Extravaganza, the World Wine and Food Expo and the Hubcap Comedy Festival), 2. Sports Events (Curling Championships), and 3. Large concerts.

5.3.2 Why do They Come Here? The Key Visitation Motivators

ACOA (2008) has identified two types of visitation motivators to Atlantic Canada.

1. **Primary Motivators:** These are the “leads” -- tourism assets that in and of themselves motivate a visit or the #1 reason for visiting the destination.
2. **Secondary Motivators:** The “extra” reason(s) contributing to the decision to visit or something else visitors do while they're in the area.

ACOA-Tourism Atlantic research drawn from several sources reveal that **six key themes** emerge as both primary and secondary visitation motivators to Atlantic Canada (**Table 15**). South East New Brunswick features at least four of these motivators in a significant manner.

Table 15: Key Visitation Motivators to Atlantic Canada

- **Coastal Experiences**
Primary: sunbathing, swimming, coastal viewing – rural products.
Secondary: boating, sailing, beachcombing, snorkelling.
- **Sightseeing and Touring**
Primary: Self-guided and same-day tours, scenic drives; both urban/rural;
Secondary: wilderness tours, wine and food tasting, live theatre, agritourism, spas, aboriginal experiences.
- **Culture, Entertainment and Heritage**
Primary: culinary, historic sites, fairs, & festivals, concerts/attractions – rural/urban products.
Secondary: shopping, retail crafts.
- **Outdoor Activities**
Primary: Camping/RV'ing, hiking/walking, fishing, golf
Secondary: exercise, jogging, wildlife viewing, cycling, motorcycling, horseback riding.
- **Experiential Accommodations:**
Primary: cottages by the sea, seaside/lakeside/riverfront resorts
Secondary: camping and RVing, heritage and country inns.
- **Major and International Events:**
Primary: golf, special cultural events (i.e. Congrès)
Secondary: professional sporting events.

The motivators are broadly defined and can also be looked at in the context of urban versus rural versus urban/rural application.

New Brunswick's Department of TAP has further specified top motivators for Quebec visitors as:

- Beaches
- Acadian Culture
- Natural wonders – outdoors
- Seafood

Additional information on how visitors plan and book trips as well as activities pursued while on vacation are shown in **Appendix D**.

5.3.3 Special Interest/Niche Markets

Given the push toward niche markets, there are several markets which were explored for South East New Brunswick. The potential for each is discussed below.

When analyzing the potential for these markets, it is critical to examine the market size and participation in various activities. The most comprehensive data in this area is the Tourism Attitudes and Motivations Survey (TAMS), undertaken in 2006 (currently being revised and updated) (ACTP website). Activity participation while on vacation is shown in **Table 16**.

Table 16: Canadian & US Markets – Activities Pursued while in Atlantic Canada (TAMS 2006)

	Canadian Visitors 1,928,287 primarily Region, Ont, Que then Alta, BC	US Visitors 3,154,797 primarily NE, MA, SA
Number who took a pleasure Trip to Atlantic Canada		
<i>Percentage of total visiting NB</i>	60%	44%
<u>Culture & Entertainment</u>		
Shopping & Dining	88%	88%
Historical Sites, Museums & Art Galleries	73%	80%
Fairs, Festivals	46%	62%
Theme Parks & Exhibits	41%	55%
Fine Dining, Spas	n/a	45%
Musical Concerts, Festivals & Attractions	40%	n/a
Live Theatre	28%	30%*
Agri-Tourism	19%	25%
Amateur Tournaments	14%	11%
<u>Outdoor Activities</u>		
Ocean Activities (swimming etc.)	60%	48%
Wildlife Viewing	56%	54%
Boating, Swimming	45%	27%
Hiking, Climbing, Paddling	44%	38%
Cycling	18%	12%
Fishing	35%	22%
Individual Sports & Games	26%	28%
Golfing	21%	15%
Snowmobiling & ATVing	11%	10%
Motorcycling	5%	6%

1. The ATV Market

- In New Brunswick there are about 45,000 ATV riders, 60 ATV clubs and 8,800 members. South East New Brunswick consists of Regions 4 (Rogersville) and 5 with about 2,500 members.
- There are 36 ATV clubs in Nova Scotia, with an estimated 7,200 members (200 members per club on average).
- There are 6 clubs belonging to the PEI ATV Federation. Assuming 100 members per club, the estimated total of members is 600.

Potential: Low: Only about 10-11% of travelers participate in ATVing while on vacation. However, this market has some potential for off-peak season and may be feasible if several accommodations and food operators partner to target this niche for a specific time (or event) in fall or spring.

2. Golf and Sporting Activities

Golf has the potential to motivate consumers to a region (**Table 17**), with 15-21% of visitors participating in golf (**Table 16**). The GSE product base is limited with four courses (St. Ignace Golf Club (18 holes), Golf Bouctouche (18 holes), Wikiwak Executive Golf (18 holes, Shediac) and Pine Needles (NB's only 36 hole course), all positioned on the Acadian Drive with links from TAP and Golf New Brunswick (<http://www.golfnb.ca/acadian-coastal-drive>).

The Region also has several facilities that can be used by sports teams. Municipalities typically host hockey, baseball, soccer and other team tournaments as part of their recreation programs. While the economic and social impact of these visitors is important, they are not considered a major "tourism" market per se. According to ACOA - Tourism Atlantic, other sporting activities have low to medium potential to act as motivators to the Region (**Table 17**).

Potential: Golf: Even though golf is a primary motivator to Atlantic Canada, its potential for GSE is Low due to product limitations and market saturation.

Other Sporting Activities: Low; only about 10-14% of travelers pursue amateur team sports and these are currently targeted by municipalities and amateur sports organizations.

Table 17: Potential for Sports to Act as Motivators to the Region

Activity	Primary	Secondary	Rural/Urban	Atlantic Potential
Golf	X		Rural	High
Professional Sporting Events (i.e. IIHF)	X		Slant to Urban	Low (urban slant) (None)
Team Sporting Events (i.e. National Softball Championships)		X	Slant to Urban	Medium (All)
Individual Sporting Events (i.e. Triathlon/Iron Man)		X	Rural & Urban	Medium (All)
Amateur Sporting Events (i.e. Canada Games)		X	Rural & Urban	Low (All)

Source: ACOA-Tourism Atlantic, 2008

3. Naturalists, Birdwatchers

Groups such as naturalists and birdwatchers can be easily targeted through the web. The clubs and organizations listed in **Table 18** can all be accessed via free or inexpensive databases and represent appropriate niche markets for GSE natural heritage attractions. The size of this market is estimated at 7,750 for the Maritimes. Database access and development is relatively simple and the market can be targeted for special events, programs and migration patterns.

Potential: Medium to high; nature-based attractions are well-positioned to work together, cross promote and develop a targeted database made up of these groups. A summer student might be hired to develop the database.

4. Cyclists

Before cyclists can be actively targeted as a market, appropriate cycling trails throughout the region must be mapped and promoted (including distances, type of surface and degree of difficulty).

Organizations responsible for the promotion of bicycling throughout their respective provinces are Velo New Brunswick, Bicycle Nova Scotia and Cycling Prince Edward Island. In addition, there are clubs in various locations throughout the Maritimes. However, the most likely targets for cyclists are pleasure cyclers who like to explore the destination. A high proportion of Quebec visitors cycle, as do many families.

Potential: Medium -- about 18% of Canadian visitors participate in cycling so the market has potential to be targeted but regional trails need to be linked and mapped prior to promoting to this market once they arrive.

Table 18: Regional Nature Clubs and Organizations Accessible via the Web

New Brunswick Federation of Naturalists Est. Market Size: 2,800	Nova Scotia Federation of Naturalists Est. Market Size: 3,750	PEI Environmental Organizations Est. Market Size: 1,200
http://www.naturenb.ca/English/federation.htm	www.naturens.ca/node/6	http://www.gov.pe.ca/infopei/index.php3?number=11045&lang=E
Bouctouche	Annapolis	PEI Wildlife Federation
Gagetown	Barrington	Environmental Coalition
Chignecto	Bloomidon	Island Nature Trust
La Peninsule acadienne	Cape Breton	Island Trails
Memramcook	Cole Harbour	Islanders for a Better Tomorrow
Madawaska	Antigonish	Natural History Society
Nature du sud-est (Dieppe)	East Hants	PEI Eco-Net
Fredericton	Halifax	North Queens Wildlife Federation
Kennebecasis	Les Amis du Plein air - Cape Breton	St. Peter's Environmental Committee
Miramichi	Pictou	Nail Pond Community Enhancement
Greater Moncton	South Shore	
Restigouche	Truro	
Saint John	Tusket River	
	NS Wild flora Society	
	NS Bird Society	

5. Boaters

The GSE Region coastline offers ample opportunities for pleasure boaters at various access points along the Northumberland Strait and Bay of Fundy. The pleasure craft boating market is relatively small. As shown in **Table 19**, marinas in the South east serve relatively few visitors per season. Berths are essentially at capacity. There may be an opportunity to target boaters if marinas join forces and position themselves as a boating stopping point, with access to attractions and services required by recreational boaters.

Marinas in other Maritime Provinces and bordering New England states represent the most likely targets if an effort is made in this area.

The market would require a targeted and concerted effort by a partnership of GSE marinas. It would be worthwhile for managers of these facilities to meet on an annual basis to examine possible partnerships. There is also a possibility of eventually positioning the region within Le corridor bleu from Quebec and Northern NB.

Potential: Low, unless targeted effort is made by marina partnership. The marinas and wharves in the Greater South East Region could be encouraged to further participate in the *Célébrons nos Quais* project and to facilitate new outdoor activities.

Table 19: Visitors to GSE NB Marinas – 2008

MARINAS	BERTHS	MEMBERS	VISITORS PER SEASON	RESTAURANT BAR	SHOWERS/WASROOMS	SEASON	VISITOR RECEPTION
RICHIBUCTO	60	45	70 boats	NO	YES	June 15 to Oct 15	YES
BOUCTOUCHE SAWMILLE POINT	52	52	100 boats	NO	YES	June to Sept.	YES
COCAGNE CAPE (GRANDE-DIGUE)	69	67	200 boats	YES	YES	15 th June to 15 th Sept	YES
COCAGNE	36	36	100 boats	YES	YES	May to Sept.	YES
POINTE-DU- CHÊNE	100 +	900 user fees	1,000+ boats (est.)	YES	Washrooms only	May to Oct	YES
SHEDIAC BAY	200	n/a	500+ boats (est.)	CANTEEN	YES	May to Oct	YES

Source: Compiled from telephone interviews with marina managers by Tourism Synergy Ltd in March 2009.

6. PRODUCT/MARKET MATCH

Based on market profiles, trends, motivators and Regional tourism supply features, this section involves *product/market matching*, to identify potential tourism products, experiential and learning enrichment activities and events that are most appropriate for the Greater South East Region – matching the products with the markets that are most likely to succeed. The analysis produced the following product/market match and identified gaps in the marketplace (**Table 20**).

Table 20: GSE Tourism Product/Market Match

Motivator (Tourism Atlantic, 2008)	Atlantic Canada Motivators with High Potential	Match with South East NB Tourism Products	Gaps
• Coastal Experiences			
<i>Primary Motivators</i>	sunbathing & swimming, coastal viewing	13 beaches & swimming spots with major icons (Parlee, Dune de Bouctouche, KNP)	Promoting the range of experiences
<i>Secondary Motivators</i>	nature & beachcombing (H), boating & sailing (M)	nature parks, beaches, marinas, wharves	Accessible outdoor experiences
• Sightseeing & Touring			
<i>Primary Motivators</i>	self-guided and same-day tours, scenic drives	Tantramar Touring Series (to be updated)	Few self-guided or same day tours.
<i>Secondary Motivators</i>	rivers, wilderness tours, winery tours	Have the basic assets	Not organized.
• Culture, Entertainment & Heritage			
<i>Primary Motivators</i>	dining, historic sites, fairs & festivals, concerts, attractions	20 museums & sites, 2 fairs, 3 lead festivals, 50 local festivals, weekly community concerts	Need for more interpretation and experiential products.
<i>Secondary Motivators</i>	(H): wine & food tasting, live theatre agritourism (M): spa, aboriginal experiences, shopping & retail crafts	Agritourism businesses, Le Pays de la Sagouine, Live Bait Theatre, Monument Lefebvre theatre, Mount Allison performing arts series, a few spa facilities, arts & crafts	Promote regular programming to regional markets. Enhance product offering in all of these categories.
• Outdoor Activities			
<i>Primary Motivators</i>	(H): Camping/RV'ing, hiking/walking, fishing, golf	26 campgrounds, few charter fishing (Shediac Bay Cruises), 5 golf courses	Not enough interactive opportunities.
<i>Secondary Motivators</i>	exercise/jogging, wildlife viewing, cycling, motorcycling, horseback	Trans Canada Trail & community trails (200 kms) (walking, cycling), wildlife (bears, bison, birds, seals), annual motorcycle event, etc	Trails are not mapped or connected. Use to build experiences.
• Experiential Accommodations			
<i>Primary Motivators</i>	seaside, lakeside and riverfront resorts, cottages by the sea	35 cottage operators and 231 units. Several B&B's and inns (approx 10 superior quality inns)	Few heritage inns and resorts.
<i>Secondary Motivators</i>	Camping & RV'ing, heritage & country inns	26 campgrounds	A lot of seasonal sites; activities need to be highlighted.
• Major and International Events			
<i>Primary Motivators</i>	Golf, Special cultural events	CMA 2009; World Curling, concerts	Partner with Greater Moncton.
<i>Secondary Motivators</i>	Sporting events (professional & amateur)	Occasional professional events, many amateur events	

6.1 Market-driven Product Development Opportunities for the GSE Region

The shift towards Experiential Tourism is the most critical factor to consider in terms of adopting an overall product development approach. Tourists are seeking adventure and education travel. It will be important for tourism operators and communities in the Greater South East to understand and develop authentic experiences.

There is a strong base of tourism assets in the GSE Region to work with from a product development point of view particularly with nature, culture and heritage.

Tourism product experiences today must fulfill ten essentials in order to have appeal to customers (**Table 21**). These essentials apply equally to attractions, accommodations, culinary and other tourism operations.

A tourism Product is what we buy.

A tourism Experience is what we remember!

Table 21: 10 Essentials of Successful Travel Products

- 1. Well-themed:** Experience matches a distinguishing theme or brand. The remaining Nine Essentials stem from the success of the them
- 2. Authentic:** Real versus contrived.
- 3. Emotional Trigger:** Experience causes an emotional reaction
- 4. Accessible:** Ease of access to: a) product information, b) purchase, c) site location and d) mobility at the site.
- 5. Educational:** Experience provides a unique learning opportunity.
- 6. Enriching:** Experience leaves the customer changed.
- 7. Entertaining:** Experience evokes joy, laughter, fun.
- 8. Hands-on:** Customer is a participant versus spectator
- 9. Value-Added:** Experience delivers over and above the promise; has an element of surprise.
- 10. Exceeds Expectations:** Experience has a Wow! factor -- 'blows' the customer away.

6.2 Product Gaps and Potential Entrepreneurial Opportunities

During the implementation of this strategy, a group charged with overseeing product development could help identify gaps which could be transformed into new products and experiences. The Enterprise Agencies and government partners could help promote private sector involvement. An experiential product development workshop would facilitate the development of new opportunities.

Several municipalities are involved in operating tourism facilities (campgrounds, parks, museums, etc). Many are also planning and developing new tourism infrastructure and attractions in their communities to generate visitor traffic.

Types of new tourism opportunities:

- Enhance feasibility and competitiveness of existing operators (new and improved)
 - Additional revenue for other types of businesses (i.e., fisheries, farming)
 - Community Groups (add activities, guiding services, charge for it)
 - New development (outdoor activity operators, culinary experiences, arts & crafts, touring & interpretation services, geo-caching experiences, economuseums, etc).
- **Cruises:** As part of this strategy, an evaluation of the potential to develop the cruise market was conducted with Pointe-du-Chêne. The SWOT Analysis is shown in **Appendix B** and further explored in a separate report.
- **Festivals & Events:** These events help bring an energy and vibrancy to the region where it is held and make an important contribution to the economy of the municipality. It is necessary to consolidate, link and promote them.
- **Focus on extending the season** (including those at attractions, events and other products) – Spring Sugar Season, Fall Bounty events, ATV special events in the off-season, bird migration (spring, fall).
- **Latent Resources:** what resources in the community have the potential to become experiences for visitors? Individuals and groups including retired professionals, such as:
- Arts community: artists, crafters, entertainers, musicians, cultural associations
 - Heritage Resources: historical associations, local historians
 - Specific Industry : fishermen, farmers, agritourism initiative being spearheaded by the Really Local Group of Producers, recreational fisheries associations, shellfish growers association, herring smoker group, and fish plants, among others.

7. MARKETING STRATEGY and POSITIONING

7.1 Marketing Strategy

Overall, the goal of the marketing strategy is to reposition and create awareness of the GSE Region of New Brunswick as a cultural and coastal jewel. Specific marketing objectives for the GSE are to:

1. Increase visitation to and expenditures in the Region.
2. Better identify markets that are currently coming to the Region.
3. Capitalize on: 1. domestic (New Brunswick), and 2. regional markets (Nova Scotia and PEI).
4. Work as a partner with both NB Tourism and Parks and Tourism Greater Moncton.
5. Position and promote South East New Brunswick as a cultural and coastal jewel.

The GSE strategy must tie into the TAP market focus for 2009 and beyond (**Table 22**).

Table 22: NB TAP Market Focus 2009

- Focus on in-close markets
 - Quebec, Nearby States
 - Regional (new emphasis on NB resident)
- Improvements to consumer website
- Use technology (ie. Customer Relationship Management – CRM)
- Evolve campaigns
- Maximize CMA (Census Metropolitan Area) information
- Intercept – to capture Ontario and others

The basic approach to the tourism marketplace is shown in **Table 23** and key elements are highlighted on the following pages.

Table 23: GSE Market Focus and Approach to the Tourism Marketplace

- Focus communications on a simple and unique message.
- Focus on: 1. Regional market (NB, NS, PEI), the most stable market, with possibilities for Intercept, 2. Québec, 3. Ontario & États-Unis/USA
- Focus efforts on digital and electronic marketing; shift gradually from print.
- Focus on emotive appeals that connect to product strengths and clusters, in the categories of natural and cultural attractions and experiences.
- With 60% of repeat visitors, messaging should also include other clustered “experiences” (supporting and sustaining) to give visitors additional incentives to visit.
- The “cultural coast” is the tip of the iceberg; delve into types of cultural and coastal experiences (that tie in to the 6 motivators to NB and the Region).

PROMOTION

a) Consumer:

The major communications directed at consumers must be focused and incorporate: a) the web, b) a Regional, clustered map, c) a Regional ad in the NB Travel Guide and website, and c) a Regional ad in the Greater Moncton Travel Guide and website. It will be important to work with TAP to ensure that the GSE has maximum coverage this summer.

A Regional website portal serves to redirect visitors to other, individual websites. The portal serves as a one-stop-shop for Festivals and Events in the Region. Because the SETTA and Kent TA already produce some major promotional pieces (guides, maps), these organizations must be worked with to build appropriate content. The idea is to use a template for festivals and events submission, notify all festivals and events that this is available, and input data received. In addition, it will be important to ensure that GSE assets are linked to the NB Tourism and Greater Moncton websites.

The TAP Communication Centre in Campbellton (1-800- line) represents the front line for telephone inquiries and it is important that the GSE is known as a destination to these employees, consequently presentations can be made by the GSE to ensure this occurs.

b) Media and Trade

The media must also be attended to; it will be important to assist TAP and Greater Moncton in coordinating media and FAM tours throughout Region.

Many communities participate in tradeshow throughout the region, however there is a great deal of overlap. A regional presence that “sells” the Region and its travel products is needed in targeting the trade.

c) TAP’s Intercept Program

Because many of our visitors are flexible on trips, TAP has renewed the **Intercept Program: A Grass Roots Approach**, targeted at Communities, to encourage visitors to stay longer in the province. If only 10% can be encouraged to stay an additional day, this increases the yield, which is a key goal of the marketing strategy.

www.gnb.ca/0397/documents/2009_intercept_grassroots-e.pdf

d) Market Readiness: Marketing Handbook

Operators need to know what resources are available to them. TAP produces a Marketing Handbook that all operators are able to download (free).

Tie into the provincial strategy as much as possible, with the knowledge that the Agency of Record for TAP will change this year and the focus for 2010-2013 may change.

www.gnb.ca/0397/documents/2009_tourism_strategy-e.pdf

7.2 Positioning the Region

Positioning: involves “*establishing a distinctive place in the minds of customers, relative to competing destination*”. Positioning can involve adding new products or abandoning certain offerings and/or withdrawing completely from some markets.

Theming: *marketing messages may vary by target audience but there should be a consistent theme. This includes advertising, signage and all other forms of communication.*” (Lovelock, 2006).

Design Development: *the goal is to create a “look and feel” -- i.e. a graphic treatment that will permeate all of the communication and promotional vehicles utilized by the GSE Region in order to present to the identified markets a coherent, unique and distinctive graphic identity.*

Positioning Themes and Graphics

Three themes and graphics packages were developed, consisting of:

- a graphic identifier with tag line shown in French and English
- a Provincial travel guide ad shown in English only
- a bilingual trade show panel

The Three Initial Themes

1. **SOUTHEAST NEW BRUNSWICK**

This is the most obvious place to start – using the regional name as the theme. We attached to this the fact that the Southeast offers multiple entrance points to the province thus the tag ... all roads lead (you) here... *toutes les routes vous mènent ici*.

2. **NATURE'S DOORSTEP**

Based on the results of stakeholder participation in the themed workshop “nature” received the highest rating. This theme/graphic combines the location with the natural elements but includes reference to the Acadian culture and the tag “fantastique” ties directly into the provincial tag line.

3. **CULTURAL COAST**

Once again, based on the results of stakeholder participation in the themed workshop “culture” received rating just below that of “nature”. This theme/graphic goes deeper in identifying the “place” of the Southeast Region and combines the importance of culture with nature in the word “coast”. The idea of “Cultural Coast” ties into global references such as the Gold Coast, Ivory Coast, Côte d’Azur etc. It seems to combine all the unique features of the region but exists on a higher level than the others presented and offers a wider range of applications. One of the suggested tag lines, “Where l’Acadie greets Fundy” reinforces the unique position of the Southeast Region being located on both the Acadian and Fundy Coastal Drives.

Cultural Coast is the unanimous choice by the Steering Committee and the graphic identifier recommended by Tourism Synergy Ltd. See **Figure 13** for three proposed tag lines.

The intent of these pieces is that they be tested in the marketplace before a final choice is made.

A limited library of promotional tools that can be later produced and used by the Region has been provided separately and includes digital artwork for a: 1. graphic identifier, 2. tradeshow booth banner, and 3. promotional ad for the New Brunswick Travel Guide.

Figure 13: The Recommended Regional Graphic Identifier and Three Tag Line Options



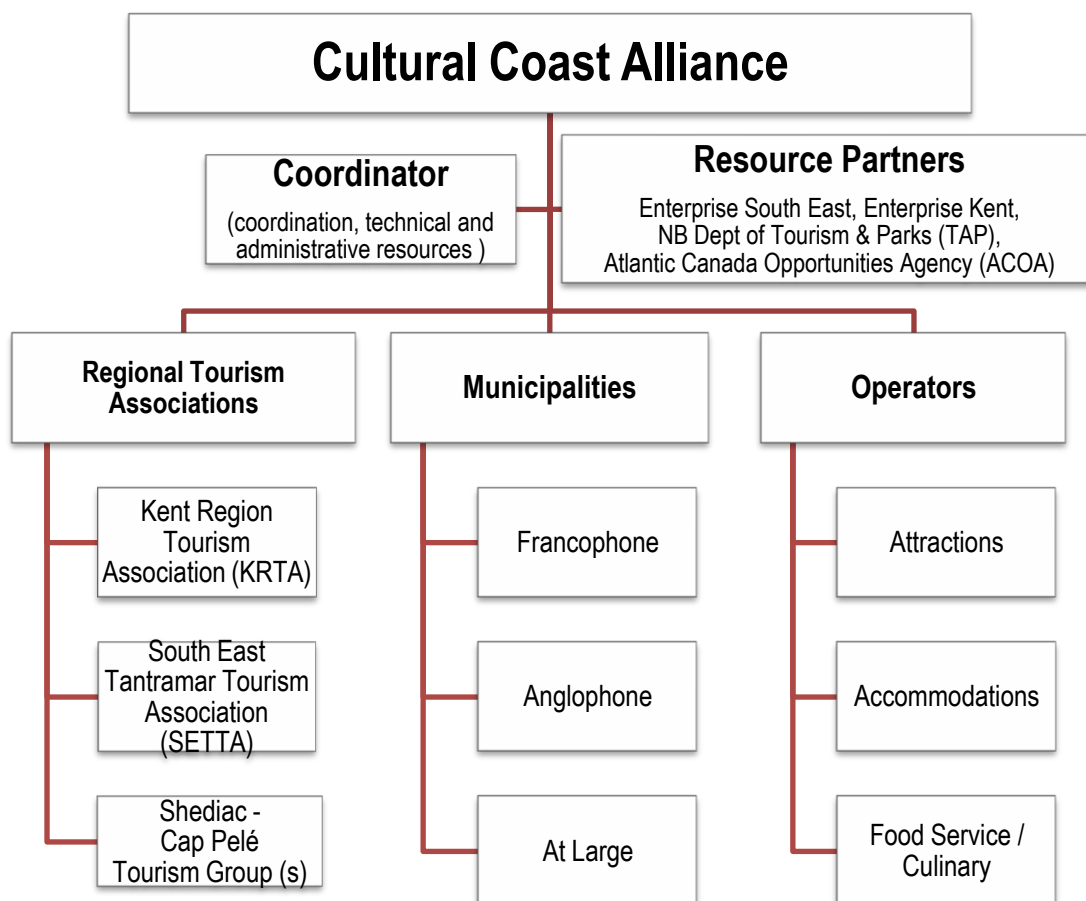
8. CULTURAL COAST ALLIANCE: ORGANIZATION & IMPLEMENTATION

There are numerous groups and municipalities involved in tourism-related activities throughout the GSE Region (**Appendix E**), which demonstrates multi-level interest and involvement in the tourism sector. However, the current fragmentation of resources reinforces the need for a well organized central coordination mechanism and effective means to communicate information between the various stakeholders throughout the entire area.

8.1 Coordination Mechanism

A central coordination mechanism should be created to implement and oversee the new regional tourism strategy (**Figure 14**). It is designed to bring the various stakeholders together and build on the current momentum of the various operators, municipalities and groups that are interested in working together to create the new GSE tourism destination – New Brunswick’s Cultural Coast.

Figure 13: Cultural Coast Alliance – Proposed Composition



8.1.1 Key Considerations

While the coordination mechanism will be set up as a volunteer structure, it is important to ensure the best possible representation and forward thinking participation of the many stakeholders in the implementation process. Here are a few guiding principles to help direct the work of the Cultural Coast Alliance as:

- This new structure is not intended to replace the roles of the Regional Tourism Associations, but rather to foster a strategic alliance of the many stakeholders at the larger regional destination level. It must not duplicate efforts of any tourism stakeholder but rather foster collaboration and partnerships as it seeks to increase organizational capacity in the region. It is possible that it may evolve as a coordinating structure over the next few years.
- The Cultural Coast Alliance should create an enabling environment to foster active industry leadership, municipal support and active stakeholder participation throughout the implementation process of the strategy. This becomes a bottom up best practice model.
- The overall approach is based on enabling the various stakeholders to be effective in their roles and be active in the implementation process. It will be important that everyone has a sense of shared responsibility to achieve the overall strategy objectives and to support sub-committee work.
- Encourage representatives to have communication linkages with their counterparts, as much as possible, i.e. that they can report back to their regional groups and receive ongoing feedback (municipal associations, tourism groups, etc).
- Gaps to fill: new TAP representative for the GSE Region, tourism group (s) for Shediac / Cap Pelé, encourage the eventual participation of the Aboriginal Communities.

8.1.2 Sub-Committees

Three sub-committees of the Cultural Coast Alliance would be created to advance the work in the priority areas of the strategy. By involving key stakeholders and individuals with specific sector skills in their respective areas, they will become strong working groups in their own right as they provide key leadership in the implementation process of the regional tourism strategy.

- **Product Development**: experiential focus, mapping and linkages, specific sector initiatives.
- **Marketing**: new positioning, marketing tactics and partnerships.
- **Education & Training**: operator capacity-building, frontline training and visitor services.

8.1.3 Coordination and Technical Support

It is crucial to ensure that proper resources are mobilized to implement the strategy. The ultimate results will be closely tied to the organizational capacity to put the recommendations into action. The various stakeholders are interested in participating, but they are mainly volunteer leaders with very limited resources and will need focused professional and technical resources to support their leadership efforts.

While not all initiatives are expensive to implement, many are time consuming and require strong organizational support. There is a very large task in coordinating overall efforts and building partnerships as a key short term priority in and of itself. This is critical from the start in order to build from the current momentum and to develop long term leadership and community capacity.

Coordination resources should include a combination of professional, technical and administrative resources. There is a critical need for a professional tourism development officer to serve as the coordinator of the overall strategy, committed to the full length of the new regional tourism strategy, from 3 to 5 years. This resource person will play a critical role in supporting the coordination mechanism, mobilizing resources and consolidating the efforts of the various stakeholders to implement the recommendations of the strategy. Additional administrative and technical resources will also be required to set up specific initiatives and support the work of the committees.

8.1.4 Stakeholder Roles

It is a massive undertaking to regroup the many stakeholders who are involved in tourism development in the Greater South East: at least 300 operators directly involved in some form of tourism, including non-profit and private sectors, plus many other businesses and organizations that indirectly benefit from tourism along with the involvement of the three levels of government.

Many have varying degrees of responsibility and involvement as they wear different hats in their organizations or enterprises. The Cultural Coast Alliance must be relevant in bringing together the big picture, consolidating efforts and inspiring everyone to work towards the same goal. This will require open and ongoing communication with stakeholders as they taken on various roles.

- **Leadership / champions:** Encourage industry to lead the development process by mobilizing individual champions in each field. This would also involve supporting key organizations to enhance their capacity to lead in their respective areas.
- **Support:** Set up a support system to assist in mobilizing resources and providing technical assistance to industry operators. This would include encouraging the Enterprise Agencies and government departments & agencies to form a technical support team to provide information and support for product development initiatives and enhanced business competitiveness.
- **Partnerships:** Foster partnerships between operators, communities, regions, to offer complementary products, regional marketing and education & training programs.

8.2 Potential Funding Sources

There are various levels of funding required for the implementation of the Greater South East Regional Tourism Strategy. First and foremost, ensuring the buy-in of the various stakeholders involved will provide the basis for leadership and organizational support to help mobilize the necessary resources.

Essentially funding requirements can be broken down by: professional / human resources, technical resources, material and capital costs. For the purpose of the new strategy, funding requirements will be based on three broad categories: general technical support / capacity building which will include coordination support, product development and marketing and various others.

8.2.1 Local Resources

Certain organizational resources will be helpful in supporting the coordination mechanism and spearheading some initiatives through the participation of various staff resources of stakeholder organizations. While the Regional Tourism Associations have very limited operational resources, they could make in-kind contributions, contributing to the overall implementation.

Membership fee structures would not be advised at this time due to the nature of the capacity-building alliance; however it would be possible for operators, attractions, municipalities and other stakeholder groups to sponsor certain projects and to participate in marketing initiatives.

The following is a list of revenue generating ideas that could be further examined and be built into the coordination mechanism to leverage with government program funding applications:

- **Stakeholder organizations**: Lead partners investing resources in sponsoring certain projects that would also benefit the regional tourism strategy including leveraging their in-kind contributions, cash investment and human resources (ex: sector groups that spearhead certain product development initiatives)
- **Leveraging of existing resources for cooperative regional tourism marketing**: Pool together certain portions of marketing funds of the municipalities, attractions and major operators that could be leveraged in Cultural Coast marketing tactics.
- **Pay to play and cost-recovery**: Smaller operators would pay to participate in various marketing tactics, while education and training programs could include participant fees (FAM tours, training sessions, etc)
- **Future profit-generating activities**: Cultural Coast promotional items (e.g. postcards, etc) industry sponsored events that may generate funds and other innovative ideas (e.g. recognition evenings, culinary events, etc)

8.2.2 Government Programs and Resources

It should be noted that the following list consists of preliminary ideas to further explore with the new Coordinating Committee, the Enterprise Agencies and government departments. Potential sources of funds and resources are shown in **Table 24**.

Table 24: Potential Sources of Funds and Resources

Key Elements	Potential Source	Notes
Technical Support & Capacity Building	- Enterprise Agencies (CEDA Fund)	
	- ACOA (Tourism Atlantic, non-commercial, new community adjustment fund, official languages, etc)	Various initiatives may qualify Special note on new Market Readiness Programs (Day Clinic)
	- NB Regional Development Corporation (RDC) planning and development assistance as well as Northern Fund that includes (Northern) Kent Region	Various initiatives may qualify
	- NB Post-Secondary, Education, Training & Labor (PETL)	Human resource support, labour force and training initiatives
	- TIANB: Tourism Technology Program (tt.com)	Info session and operator prog
	- NB Tourism & Parks (TAP)	Product Development Criteria, Marketing & Media
	- Dialogue NB	Translation
	- RDÉE	Various initiatives may qualify
Product Development & Marketing	- NB Dept of Wellness, Culture & Sports	Limited resources but resources for museums, interpretation, arts
	- NB Department of Agriculture & Aquaculture	Agritourism
	- NB Department of Fisheries	
	- NB Trails and other trail development associations	
	- NB Dept of Environment	Sustainable development, recreational fisheries habitat
	- Heritage Canada	Various initiatives may qualify Special note on Festivals
	- Virtual Museums	
	- Aboriginal Development	
	- Parks Canada	Heritage sites with communities
	- Visitor Satisfaction Program (ACTGA, Tourism Atlantic)	Accommodation Operators
- Agriculture Canada (Rural Best Practices)		
Other / Various	- Charitable Foundations	Heritage, arts, culture, environment and related themes

* Some sources under *Technical Support / Capacity Building* may offer assistance for various types of needs that are presented as a specific initiative.

8.2.3 Future Accommodation Marketing Levy

There has been much talk of the possibility of implementing a marketing levy (also known as a Destination Marketing Fee, Hotel Levy, Hotel Tax) to generate marketing dollars. In the South East NB Region, the levy would be challenging to implement. Accommodation operators and municipalities must be consulted, convinced of benefits and "on-side" before this could become a reality. This is a minimum 3-5 year planning process.

Such fees are typically collected by the accommodation sector and managed by a local Destination Marketing Organization (DMOs). DMOs are funded through levies, government grants and/or membership fees; they are sometimes called Convention and Visitor Bureaus (CVBs).

NB Levy Status:

- In New Brunswick, Saint John, St. Andrews and Bathurst have implemented levies of either 2% per room or \$2.00 per room per night.
- The hotel industry of Greater Moncton is working toward forming a hotel association in order to initiate a hotel levy system.
- Destination Halifax and Tourism Charlottetown are currently collecting a voluntary levy. - Collection figures range to up to 3% across Canada.
- Funds are used for marketing and/or product development and typically collected and administered by a DMO or independent third party (not a municipality).
- TIANB has developed a set of guiding principles for a Hotel Levy.

Implications for the Greater South East

A marketing levy could potentially generate annual revenues of \$30,000 - \$50,000 based on \$2 / room-night fee with 100 % participation of all available units -- with the majority operating on a seasonal basis at an overall 40% occupancy. Municipalities would have to be on side prior to exploring this option. At this time, with a start up Alliance, it would be over-ambitious to undertake.

9. RECOMMENDATIONS

Regional Approach – Overall –

1. **COORDINATING COMMITTEE:** Form a Regional Coordinating Committee with sub-committees to oversee the implementation of the new regional strategy. Major implementation steps are shown in **Table 24**.
Integrating Mechanism: Regional Committee (e.g. Cultural Coast Alliance)
Suggested Committee Makeup: 9 members - 3 Municipal reps; 3 Regional Tourism Groups (Kent, TTA, Shediac/Cap Pelé; 3 Operators (Attractions, Accommodations, Culinary). Plus two non-voting members (Enterprise agencies) (Find Champion to chair)
Rationale: Needs to be industry led, stakeholder driven and municipally supported.
Estimated Cost: Organizational costs and administrative expenses. (approx. \$10,000)
Timeframe: Immediate, by July 2009.
Responsibility: Steering Committee

Table 25: Major Implementation Steps

Step 1

Form new Coordinating Committee to represent the entire Greater South East Region to guide and oversee the action phase of the strategy. This central committee would serve as a liaison to key stakeholder groups in the GSE Region. Steering Committee to initiate this process, supported by the Enterprise Agencies and the key stakeholder partners, to ensure proper transition of the new Coordinating Committee. Find regional champion to chair the initiative and ensure that coordination resources are in place to support the implementation.

Step 2

Adopt a common vision (see next page) for the Region and ensure community “buy-in” for the positioning of the new tourism Region (Cultural Coast) and integrate the new GSE positioning into 2010 NB Travel Guide.

Step 3

Disseminate proposed vision, strategy recommendations, and action plan (timeline) for next 3-5 years. Ensure strategy and positioning are accepted by Stakeholders (municipalities, regional tourism associations, governments, individual operators) throughout the Greater South East.

Step 4

Invite all stakeholder organizations and operators to participate in the strategy. Encourage key stakeholders and groups to take leadership roles in the various initiatives in their area of expertise while participating in the regional capacity building process. Form “Ad Hoc” sub-committees to undertake tasks at hand -- formed for the purpose of implementing key elements of this strategy. Suggested sub-committees: 1. Product Development, 2. Marketing, 3. Tourism Education and Training.

Step 5

Proceed with activities outlined in “Implementation Timeline”. Ensure that new infrastructure developments, new products, experiences and services follow the chosen positioning and are in tune with the overall strategy.

Suggested Regional Vision

(to be finalized by Coordinating Committee)

To create a vibrant and sustainable coastal destination, with exciting, authentic natural and cultural experiences that appeal to residents and visitors alike.

- 2. COORDINATOR:** Ensure that proper coordination resources are in place for the initial implementation of the strategy (i.e. 3 years).
Rationale: Dedicated professional resources are required to support the efforts of the volunteer Coordinating Committee of the Cultural Coast Alliance.
Responsibility: Enterprise agencies to help mobilize the necessary resources with the Coordination Committee and government partners.
Estimated Cost: \$50,000 - \$75,000 / year.
Timeframe: Immediate and Ongoing.
- 3. FUNDING PLAN:** Adopt a regional funding approach to find the necessary resources for the implementation of the strategy (three-year funding plan).
- Combination of: Municipalities, Coop marketing (pay to play), government programs, etc.
Rationale: To ensure that the Committee has the proper resources to ensure the successful implementation of the strategy.
Responsibility: Enterprise agencies to help mobilize the necessary resources with the Coordination Committee and government partners.
Estimated Cost: Basic operations for committee and special projects.
Timeframe: June 2009
- 4. TECHNICAL RESOURCES:** Identify and obtain the technical resources to focus on various relevant elements of the strategy (e.g. web design and maintenance, interpretation and programming development, professional tourism consultant support, training initiatives (best practices in the region), etc.
Rationale: To ensure that the various initiatives are properly set up.
Responsibility: Enterprise agencies to help mobilize the necessary resources with the Coordination Committee and government partners.
Estimated Cost: Organizational Support.
Timeframe: September 2009
- 5. ADOPT BENCHMARKS:** Adopt benchmarks to assess tourism development success. Circulate to each subcommittee and other key organizations so that they can participate in the process of reporting results annually.
Rationale: It is critical to monitor whether tourism development initiatives are successful in the long term.
Responsibility: Coordinating Committee
Estimated Cost: Organizational Support.
Timeframe: Immediate and Ongoing.

Partnerships

- 6. Regional and Beyond:** Establish ongoing partnerships with TAP, Greater Moncton Tourism, Commission du tourisme acadien du Canada Atlantique(CTACA), Fundy UNESCO Biosphere Working Group, le Regroupement du Littoral Acadien (RLA), etc

Rationale: To create awareness, promote position and strengthen regional products.

Responsibility: Tourism Coordinator, Coordinating Committee.

Estimated Cost: Organizational Support.

Timeframe: Immediate and Ongoing

- 7. Internal Partnerships:** Design and implement a session called “Speed dating for partnerships” (i.e. mini-marketplace) for operators in the region.

Rationale: To begin creating synergies and foster new experience ideas.

Responsibility: Tourism Coordinator, Coordinating Committee.

Estimated Cost: \$3,000

Timeframe: January 2010

Products

- 8. OVERALL THEME:** Hire a professional interpretation specialist to develop a regional story line that permeates across the region and links the history of each community at a certain point in time.

Rationale: This links the region together and brings the story alive, providing an overall theme upon which to potential base experiences.

Responsibility: Product Development Sub-Committee with local historical societies and heritage groups, attractions, the NB Department of Wellness, Culture & Sports, etc.

Estimated Cost: \$25,000

Timeframe: Fall 2009 – Winter 2010.

9. STRENGTHEN EXPERIENTIAL PRODUCTS:

- i. Adopt the **10 Essentials of Successful Travel Products (Table 21)** as the formula for product development.
- ii. Organize a GSE Product Development Team that would bring together the professional tourism and business development resources (info, capital, technical) to work directly with the regional tourism operators. This would include representatives from the Enterprise Agencies, the CBDC’s Tourism & Parks, ACOA, and other agencies that would support the direction of the Product Development Sub-Committee. (based on the model of Team Kent, mini BR&E¹ approach)
- iii. Host a product development **Experiential Product Development Workshop** that provides hands-on training and guidance in how to create, price, promote experiential products.
- iv. Encourage professional development through operator and stakeholder participation in ACOA-Tourism Atlantic **Best Practice Missions** and other programs (e.g. Gros Morne Institute of Sustainable Tourism (GMIST), Bonavista Institute for Cultural Tourism (BICT).

Rationale: To increase the inventory of experiential products throughout the region and the capacity of operators to create these new experiences.

Responsibility: Product Development Sub-Committee

¹ BR&E: Business Retention & Expansion Initiatives that include entrepreneurial visits.

Estimated Cost: This recommendation involves re-focusing the efforts of economic development professionals in the field thus this could be spearheaded through the Enterprise Agencies (organizational resources, 9.ii). Additional costs are based on the various initiatives such as the workshop (9.iii estimated at \$3,000). The other programs listed in 9c have individual participant fees that can be cost-shared with ACOA.

Timeframe: a) Immediate; b) Workshop: Winter 2010; c) Best Practices: Spring & Fall.

10. SELF GUIDED ITINERARIES and THEMED ROUTES: Assemble regional touring product routes linking key experiences that will appeal to visitors. Sample ideas from Stakeholder Session 2 are shown in **Appendix F**.

Rationale: Unique experiences are developed and relevant information is readily available to the visitors (appealing and easy to use), including developing geo-caching experiences.

Responsibility: Product Development Sub-Committee.

Estimated Cost: Technical writing and publishing, \$5,000.

Timeframe: Spring 2010.

11. GPS MAPPING: Use the Kent Region Tourism Association model to complete the GPS coordinates mapping for the GSE Region.

Rationale: Twofold: a) Visitors can easily find Regional points of interest, and b) to serve as a launch pad for new Regional geo-caching experiences.

Responsibility: Product Development Sub-Committee

Estimated Cost: GPS Mapping of coordinates, \$20,000 depending on technical resources required.

Timeframe: Winter 2010 – 2011.

12. ACADIAN COAST BIOSPHERE: Explore the possibility of establishing an Acadian Coast Biosphere to complement the Fundy UNESCO Biosphere and further reinforce the environmental and cultural uniqueness of the Region. Find a credible Champion to lead this initiative.

Rationale: This designation helps to preserve, enhance and promote the unique attributes of the Region and is recognized worldwide.

Responsibility: Product Development Sub-Committee in collaboration with TAP, UdeM, Parks Canada, local Watershed Groups, etc.

Estimated Cost: Initial Assessment: \$10,000.

Timeframe: Begin exploring in 2011.

13. TRAILS: Encourage methods of integrating local trails into regional product experiences and ensuring that they are tourism ready with proper maintenance, signage and mapping with distances and linkages with attractions and activities. Encourage eventual linking of existing walking & biking trails (including Trans Canada, NB Trails, Sentier de l'Étoile, Fundy Biosphere & Parkway) as well as off season trails such as snowmobile, ski, etc. Work with the Fundy UNESCO Biosphere and other coordinating organizations wherever possible.

Rationale: The trails are sustaining infrastructure that connects the various points of interest.

Responsibility: Product Development Sub-Committee in cooperation with Fundy Biosphere and various local and provincial trail groups.

Estimated Cost: \$5,000 for Trail map only.

Timeframe: Spring 2010 and Ongoing.

14. OUTDOOR EXPERIENCES: Ensure the availability of outdoor activities in key areas, including waterways, on a consistent basis by a) promoting what's already available b) fostering new business development opportunities c) stimulating the supporting factors (use of public facilities and sites, insurance issues, training, etc)

Rationale: To reduce the gap in this area and to make outdoor experiences more readily available to visitors.

Responsibility: Product Development Sub-Committee working with the nature attractions, TAP, TIANB, local infrastructure such as wharves and marina groups, etc.

Estimated Cost: Organizational Support (possibly \$2,000 for initial planning work)

Timeframe: 2010 - 2011

15. ARTS: Develop new tourism products and experiences that involve the arts sector and to ensure greater linkages with other tourism products in the region. This includes supporting existing and new initiatives, such as:

- a) *Célébrons nos quais* which is an excellent project to build from
- b) Promoting regular Studio Tours and Play with an Artist Programs
- c) Various ideas in each segment, including performing arts, story telling, etc.

Rationale: There are several latent resources in various areas of the arts sector but each is undeveloped as a tourism product and these types of experiential products are in demand.

Responsibility: Product Development Sub-Committee with key stakeholders.

Encourage the various sector groups to take an active role in developing new tourism products with the arts sector, including the various cultural societies throughout the region.

Estimated Cost: Time (also product development and marketing costs depending on the initiative) (Possibly \$5,000 for initial planning work and projects)

Timeframe: Winter 2010 and Ongoing.

16. AGRICULTURE and FISHING EXPERIENCES:

- i. **Agriculture:** Support new Southeast Agritourism Strategy to promote new opportunities and ensure greater linkages with other tourism products in the region.
- ii. **Fishing:** Work with local producer(s) and industry groups in each category to develop a tour and hands-on interpretive program for visitors: i) Herring Smokers, ii) Ice Fishing, iii) Aquaculture (Oysters)

Rationale: There are active operators in each sector but each is undeveloped as a tourism product and these types of experiential products are in demand.

Responsibility: Product Development Sub-Committee with key industry stakeholders.

Each group has an industry association which can serve as a starting point.

Estimated Cost: Time (also product development and marketing costs depending on the initiative) (Possibly \$5,000 for initial planning work and projects)

Timeframe: Winter 2010 and Ongoing.

17. CULINARY: Develop a range of Culinary Experiences that raises the level of availability of local food products and prepared dishes in the region as well as tying these into new hands-on experiences involving other tourism products.

- i. Develop a (best of) culinary route that includes Signature Products (Seafood - lobster, Acadian dishes - fricot, poutine á trou, Local produce – vegetables and berries), that involve etc: a) Restaurants, b) Bakeries, c) Fish markets, and d) Other attractions and facilities.

- ii. Integrate experiential elements into current tourism product offerings.
- iii. Ensure that GSE restaurants and dining experiences are featured in the dininpick.com website.
- iv. Get the movement going... Involve local chefs, producers, interpreters, industry resources (i.e.: agrologists, biologists, etc)

Rationale: New culinary experiences are important to the quality of the overall travel experience. The resources are in the area but need to be linked. The diningpick.com website is the only source listed for links on the websites of NB Tourism and Moncton Tourism.

Responsibility: Product Development Sub-Committee with the Really Local Group of Producers and local restaurants.

Estimated Cost: \$7,000 (Potential Funds: CEDA and RDÉE)

Timeframe: Winter 2010 and Ongoing.

18. FESTIVALS and EVENTS: To enhance the product offering of festivals and events and:

- i. Organize the current multiple listings in one common place on the web portal, possibly expanding the format of the SETTA Things to Do Guide to include the entire GSE Region.
- ii. Examine the potential to gear some programming events towards visitors, this could involve looking at best practices in other regions and training for volunteer organizers on how to develop and manage these types of events.
- iii. Get the organizers of regional Festival and Events together on an annual basis to coordinate dates and to ensure complementary (not competing) offerings.

Rationale: Festivals and events are primary motivators as an integral part of culture, entertainment and heritage; they need to be accessible both on the web and during times offered.

Responsibility: Product Development Sub-Committee with leading festival organizers, including municipalities and attractions that offer programming.

Estimated Cost: \$2,000

Timeframe: Spring 2010 and Ongoing.

19. ACCOMMODATIONS: Work with fixed roof and campground operators to encourage:

- a) Upgrading and enhancement of operator sites;
- b) Development of experiential products on-site;
- c) Partnering with others who can provide experiences,
- d) Implementing new visitor satisfaction program (e.g. the new Atlantic Canada Grading Authority Visitor Satisfaction Program - VSP, sponsored by ACOA – Tourism Atlantic).

Rationale: Accommodations are generally in the decline phase of the product life cycle and need to be revitalized; the operators can play a key role in directing visitors to local attractions and be encouraged to organize their own local experiences.

Responsibility: Product Development Sub-Committee and key related sector organizations such as TAP, TIANB, Accommodation Sector organizations (B&B, country inns and campground associations, Atlantic Canada Tourism Grading Authority).

Estimated Cost: Accommodation Sector meeting and dissemination of info, \$2,000.

Timeframe: Winter 2010 and Ongoing.

Visitor Services & Amenities

20. VISITOR INFORMATION CENTRES (VIC's): Ensure that visitor information is consistent throughout the region and encourage cross-promotion of attractions and activities.

This would involve:

- a) Ensure that the VIC's have appropriate levels of service and amenities (on-site internet, off season reference information system → e.g. municipality offices which are open all year)
- b) Establish methods for effective dissemination of annual, new and ongoing information.
- c) Coordinate annual VIC training of staff while also encouraging professional development of individuals, especially supervisors (ex: e-merit certification).

Rationale: The level of visitor services is consistent throughout the region.

Responsibility: Marketing Sub-Committee with municipalities and attractions.

Estimated Cost: Organizational support and information tools (Possibly \$2,000 for initial planning work and projects)

Timeframe: a) Awareness in Summer 2009; b) Organization/Coordination in Spring 2010 & c) Ongoing thereafter.

21. SIGNAGE (directional and regional): Ensure that proper signage is in place throughout the region (whether it is government, community or operator signage):

- i. a) Directional signage leading to the region from the highways (scenic drives, entry points)
- b) Regional signage is consistent for communities and operators as well as highlighting key features, such as picnic areas, museums, marshes, rivers.
- ii. Develop a Cultural Coast identifier (marker) for picnic sites and scenic vistas network (#22).

Rationale: The Greater South East Region is presented as an appealing broad destination area and it is easy to find.

Responsibility: Product Development Sub-Committee

Estimated Cost: Organizational support then project development costs as applicable. (e.g. Cultural Coast markers)

Timeframe: 2011 - 2012

22. PICNIC SITES and SCENIC VISITS: Provide an appealing network of quality picnic sites and scenic vistas (and washrooms) for visitors to enjoy. This involves a) identifying the locations b) ensuring consistent quality amenities c) promoting the network (mapping, signage, etc)

Rationale: Visitors will be encouraged to discover the region.

Responsibility: Product Development Sub-Subcommittee with the municipalities.

Estimated Cost: Organizational support then project development costs (Coastal Coast branding to build into the designation of these sites)

Timeframe: 2011 - 2013

Markets and Marketing

- 23. MARKETING RESEARCH:** Get a better sense of visitors coming to and through the Region:
- Keep up to date with current research and trends (as per the research, product, marketing continuum on p. 7), on annual basis (ACTP and TAP websites and research departments).
 - Conduct a regional visitor survey every three years at attractions, accommodations and VIC's. Use an incentive to gain a more precise picture of visitors to the region (ex, prize).
- Rationale:** Need to know the visitor better, and keep abreast of shifts.
Responsibility: Marketing Sub-Committee
Estimated Cost: Time in examining secondary research sources and additional costs of regional visitor survey (approx. \$15,000 or less in partnership with university)
Timeframe: 2011
- 24. POSITIONING:** Formally adopt the Cultural Coast as the graphic identifier and finalize the tag line. a) Test in the field during the summer of 2009. b) Adopt its usage in marketing tools and encourage operators and municipalities to use it as well (graphic guidelines).
Rationale: This identifier fits with four of the motivators to Atlantic Canada, embraces the cultural and artistic products in the region and signifies that the region is close to the sea.
Responsibility: Coordinating Committee with Marketing Sub-Committee
Estimated Costs \$5,000
Timeframe: Summer & Fall 2009.
- 25. IMAGE BANK:** Develop an image bank of professionally produced, original photos of the region that depict experiential activities with people discovering the region. Ask operators to supply their best images and encourage TAP to gather new images of the region
Rationale: Photos needed for promotional and marketing purposes
Responsibility: Marketing Sub-Committee.
Estimated Cost: \$5,000
Timeframe: Summer 2009 and Ongoing.
- 26. WEBSITE - PORTAL:** Develop a Regional Tourism Portal website that promotes the Destination and serves as a starting point to direct visitors to links with existing products, activities, services and accommodations and food and beverage services. Immediate priority should be to ensure that appropriate linkages are in place on regional websites of local attractions and municipalities.
- Serves as a concierge that points the visitor in the right direction; offers a mix and match palette of things to do that become self-guided itineraries.
 - Provides appropriate linkages between the operators, other regions and product offerings.
 - Inquiries and hits to the website must be monitored and benchmarked, using google analytics. There will be need to incorporate social networking (e.g. perhaps interview tourists for videos and get them to send to friends while on vacation → Blogspots (Web 3.0)
- Rationale:** To regroup the region's tourism offerings in a central tool and to maximize exposure on the web.
Responsibility: Marketing Sub-Committee
Estimated Cost: \$10,000 (design, research, translation, etc)
Timeframe: Fall 2009 and Ongoing.

27. CONSUMER PROMOTION:

- i. Touring Map: Develop a themed, downloadable touring map that clusters major attractions, picnic spots and scenic vistas at each community in the Region.
- ii. Leveraged Support: Leverage partner support where possible, for example, a cooperative advertising should be sourced for the map for both electronic and printed versions (if used).
- iii. TAP Programs: Tie in to TAPs programs that build online direct relationships with consumers, wherever possible (e.g. database marketing)
- iv. Ad Placements: Explore coordinated regional, cooperative advertising placements in the Greater Moncton and Provincial websites and travel guides.
- v. Intercept: Encourage communities to participate in the TAP 2009 GrassRoots Intercept Program. There are no costs to participate, nor are there product criteria. However, there is a local human resource commitment where a community person is responsible for overseeing management of the program at the local level.

Rationale: To consolidate promotional efforts and position the area as a Region.

Responsibility: Coordinator and Marketing Sub-Committee

Estimated Cost: Map \$5,000; Ad placements \$20,000 (shared); Intercept – HR support from individual communities. * Summer 2009: Radio Tourism Ambassador Feature

Timeframe: a) Map 2009; b) Partner support 2010; c) TAP programs: 2010; d) Coop Ads: 2010.

28. TRAVEL MEDIA and TRADE:

- i. **Trade and Media FAMS:** Assist and participate in TAP and Greater Moncton trade and media FAM tours throughout Region.
- ii. **Tradeshows and Marketplaces:** Coordinate/consolidate regional participation in the major tradeshows and marketplaces that are relevant to the GSE target markets.

Rationale: To ensure that the Region is well represented in key marketplaces and avoid duplication by participating communities.

Responsibility: Marketing Sub-Committee with attractions and municipalities.

Estimated Cost: banners and promotional material for kiosks \$15,000

Timeframe: 2010 and Ongoing.

29. REGIONAL OPERATOR AWARENESS:

Publicize new initiatives, experiences, products and events internally.

- a) Develop and use a Cultural Coast Newsletter and e-mail blasts to be the central information source to inform operators and VIC's of what's happening in the region.

Rationale: Tourism stakeholders and residents often do not have knowledge of what is going on elsewhere. Accommodation and VIC operators are arguably the best purveyors of regional occurrences and often take it upon themselves to seek out information. Effective communication will be critical in this large destination area.

Responsibility: Tourism Coordinator and Marketing Sub-Committee

Estimated cost: Organizational Support and technical work to write, translate and publish the electronic information, \$3,000/year.

Timeframe: a) Summer 2009; b) Quarterly and more regularly throughout the summer.

30. MARKETING PARTNERSHIPS:

- a) Position the South East Region as complementary to Greater Moncton.
 - b) Position the South East Region within other regional product and marketing clusters.
- Rationale:** To create a positive working relationship with the Greater Moncton Region and others to generate product development and marketing opportunities.

Responsibility: Tourism Coordinator and Marketing Sub-Committee.

Estimated Cost: Time and possibly complementary marketing material

Timeframe: Some in summer 2009, formal planning in the fall then ongoing annually.

31. NICHE MARKETS: Approach niche markets with caution and only upon initiation of private sector groups.

Rationale: If operator partnerships have been self-initiated, work with these groups (e.g. nature sites, marinas, golf clubs, nature to assist in a guidance role, for both product development and marketing efforts.

Estimated Costs: n/a

Timeframe: Ongoing

32. COMMUNICATION and COMMUNITY AWARENESS: Communities must be continually made aware of the importance of tourism, its economic impact, new projects and activities being undertaken. This awareness is critical if the Cultural Coast Alliance is to remain alive. Make extensive use of news releases to regional publications, newspapers, websites to inform the general public of local tourism initiatives.

Rationale: Not only do communities need to be aware of tourism and its importance, municipalities must feel that dollars expended have a yield, the region must get a sense of itself as an "entire" region, and residents are in a strong position to influence visiting friends and relatives (VFR); VFR makes up about 25% of the overall visitor market to New Brunswick.

Responsibility: Tourism Coordinator and Marketing Sub-Committee.

Estimated Cost: Organizational Support

Timeframe: Immediate and Ongoing

Community Capacity Building/HR/Training**33. TECHNOLOGY CAPACITY**

- a) Encourage and educate attraction and accommodation operators to have attractive websites and to provide transactional capacity (for booking and reservation);
- b) Use the tt.com (Tourism Technology.com Program) to work with individual operators.

Rationale: This is a general weakness in the region's tourism industry, particularly the accommodation operators of which only 20% have the ability to transact on the Web.

Responsibility: Education & Training Sub-Committee

Estimated Cost: Organize an information session with TIANB Tourism Technology Resource Coordinator. The actual cost of the tt.com program is \$125 per operator.

Timeframe: Winter 2010 and Ongoing.

- 34. TOURISM OPERATOR EDUCATION & TRAINING :** Ensure that GSE operators have access to appropriate training in areas that support product development, marketing, human resources planning and overall business competitiveness.
Rationale: To build stronger operator capacity.
Responsibility: Education & Training Sub-Committee to identify needs with organizational support by the Tourism Coordinator and Labour Force Staff of the Enterprise Agencies
Estimated Cost: Use existing programs or organize training sessions
Timeframe: Fall 2009 and Ongoing.
- 35. FRONT LINE STAFF EDUCATION & TRAINING:** Promote available programs targeted at front line staff, VIC staff, interpreters. (Superhost, e-merit certification programs offered through TIANB).
Rationale: To provide trained human resources and encourage professional development.
Responsibility: Education & Training Sub-Committee to identify needs with organizational support by the Tourism Coordinator and Labour Force Staff of the Enterprise Agencies and to work with educational institutions and industry groups to deliver programs.
Estimated Costs Use existing programs or organize training sessions
Timeframe: June 2010 and Ongoing.
- 36. AMBASSADOR PROGRAM:** Expand the Tourism Ambassador Pilot Project currently underway in Shediac, Sackville and Cap Pele to the entire GSE Region.
Rationale: To ensure that there is a network of tourism ambassadors throughout the region.
Responsibility: Tourism Coordinator with Education & Training Sub-Committee
Estimated Cost: Development and training costs
Timeframe: 2011 - 2012
- 37. MARKET READINESS PROGRAMS:** Buy into and organize a program for our region targeted at operators that will be recruited. New day clinic and intense market readiness programs to be delivered through ACOA – Tourism Atlantic and district offices (Day Clinic or Intensive program).
Rationale: To enhance the regional and individual operator capacity and put in place mentoring resources.
Responsibility: Tourism Coordinator with Education & Training Sub-Committee.
Estimated Cost: Cost-sharing with the new ACOA - Tourism Atlantic program (50%), possibly with an additional top-up of 25% by the province with the balance paid by the operator (minimum cost of 25%). Total cost: minimum of 10 operators at an approximate cost of \$2,500/each, total cost of \$25,000.
Timeframe: 2010 -2013
- 38. REGIONAL FAMILIARIZATION (FAM) TOURS (x2):** Need to have for the whole region. Consider a day and charging a modest fee (\$10) per participant to help defray costs. Anyone can go. Do in one day; provide itineraries for those who cannot attend and pass along to key distribution points (gas stations, VIC's)
Rationale: To provide a first-hand view of the region's tourism product to front line and VIC staff.
Responsibility: Education & Training Sub-Committee
Estimated Cost: Organizational and transportation (self-recovery) (basic budget of \$2,000)
Timeframe: June 2010, and annually thereafter.

39. CULTURAL COAST BEST PRACTICE WORKSHOPS: Showcase Regional tourism products “internally” by holding “*best practice workshops*” targeted at Regional tourism operators. Consider a 2-3 hour session hosted by the Best Practice and charge a modest fee to cover costs.

Rationale: There are many excellent best practices WITHIN the region that could help educate operators about regional offerings and cross pollinate the Region.

Best Practice examples include (and these are only a few):

- *Self-guided itinerary development:* Sackville
- *Experiential product development:* Kouchibouguac National Park and Cape Jourimain
- *Partnership Building:* Tri-communities of Rexton, Richiboucto and St. Louis-de-Kent.
- *Fam Tours – What and How:* Kent Region Tourism Association and Sackville)
- *Heritage/heritage Interpretation:* Dorchester (several innovative sites)
- *Sustainable/green municipal practices:* Bouctouche, Cap Pelé, Sackville.

Responsibility: Tourism Coordinator with Education & Training Sub-Committee

Estimated Cost: Cost of material and hosting sessions (Approximately \$3,000)

Timeframe: Starting in late fall 2009 and continuing in 2010, then annually.

The top priorities for the next year 2009-2010 are to:

- Set up the coordinating mechanism and coordinator.
- Develop the regional tourism website portal.
- Continue building momentum with operators and encourage awareness and cross promotion this summer: Develop and distribute a newsletter to operators (what’s new, what’s happening) in an electronic format and host a Tourism Ambassador Feature with the local radio station(s) to discover the little tourism gems (added benefit of informing the local population, operators and visitors in the region).
- Conduct a Familiarization (FAM) tour for front line staff throughout the GSE (building on Kent Region Tourism Association and Sackville area FAMs).
- Finalize the tag line for the graphic identifier (test with TAP this summer)
- Develop a downloadable map of the region that identifies key attractions, scenic vistas and picnic spots.
- Conduct two workshops: 1. *Developing Experiences*, and 2. *Partnership Speed-dating*.

10. IMPLEMENTATION SCHEDULE, ESTIMATED COSTS, RESPONSIBILITY, TIMELINE

Rec #	Recommendation	Estimated Costs	Resp.	Support	Timing				
COORDINATION & ADMINISTRATION (PER YEAR)					2009	2010	2011	2012	2013
1	Coordination Committee	\$10,000	Steering Cte	Enterprise Agencies	July'09	Ongoing	Ongoing	Ongoing	Ongoing
2	Coordinator (Coordination Resources)	\$50,000-\$75,000	Enterprise Agencies	Coord Cte & Govt Partners	Immediate	Ongoing	Ongoing	Ongoing	Ongoing
3	Funding Plan	Org Support	Ent Agencies	Coord Cte & Govt Partners	June'09	Ongoing	Ongoing	Ongoing	Ongoing
4	Technical Resources	Org Support	Ent Agencies	Coord Cte & Govt Partners	Sept '09	Ongoing	Ongoing	Ongoing	Ongoing
5	Adopt Benchmarks	Org Support	Coord Cte		Immediate	Ongoing	Ongoing	Ongoing	Ongoing
IMPLEMENTATION OF TOURISM STRATEGY									
PARTNERSHIPS									
6	Regional & Beyond	Org Support	Coord Cte		Immediate	Ongoing	Ongoing	Ongoing	Ongoing
7	Internal Partnerships (speed dating workshop)	\$3,000	Coord Cte			Jan '10			
PRODUCT DEVELOPMENT									
8	Overall Theme	\$25,000	Prod Dev.	Heritage Groups, Attractions, NB Dept of Wellness, Culture & Sports	Fall '09 -->	Winter '10			
9	Strengthen Experiential Products (workshop in winter 2010)	\$3,000	Prod Dev.	Technical Support Team	Fall '09	Spring 2010 -->	Spring & Fall	Spring & Fall	Spring & Fall
10	Self Guided Itineraries & Themed Routes	\$5,000	Prod Dev.			Spring 2010 -->			
11	GPS Mapping	\$20,000	Prod Dev.	Regional Tourism Associations		2010 -->	2011		
12	Acadian Coast Biosphere (initial work)	\$10,000	Prod Dev.	TAP, UdeM, Watershed Groups, Parks Canada			2011		
13	Trails	\$5,000 (map)	Prod Dev.	Various local and provincial Trail Groups and Municipalities		Spring 2010	2011	2012	Ongoing

Rec #	Recommendation	Estimated Costs	Resp.	Support		Timing				
14	Outdoor Experiences	\$2,000	Prod Dev.	TAP, TIANB, Nature Attractions, Marinas, etc		2010 -->	2011			
15	Arts	\$5,000	Prod Dev.	Cultural & Arts Groups		Winter 10	Ongoing	Ongoing	Ongoing	
16	Agriculture and Fishing Experiences	\$5,000	Prod Dev.	NB Dept of Agriculture & Aquaculture, NB Dept of Fisheries, Industry Groups: Really Local Group of Producers, Recreational Fisheries, Shellfish Growers, Herring Smokers		Winter 2010	Ongoing	Ongoing	Ongoing	
17	Culinary	\$7,000	Prod Dev.	Same as above, plus chefs, local restaurants and expert resources		Winter 2010	Ongoing	Ongoing	Ongoing	
18	Festivals and Events	\$2,000	Prod Dev.	Lead organizers, attractions, municipalities		Spring 2010	Ongoing	Ongoing	Ongoing	
19	Accommodations	\$2,000	Prod Dev.	TAP, TIANB, Atlantic Canada Grading Authority, groups (B&B's, inns, campgrounds)		Winter 2010	Ongoing	Ongoing	Ongoing	
VISITOR SERVICES & AMENITIES										
20	Visitor Information Centres (VIC's)	\$2,000	Marketing	Regional Tourism Assoc, municipalities and attractions	Awareness in 2009	Spring 2010	Ongoing	Ongoing	Ongoing	
21	Signage	TBD	Prod Dev.	Regional Tourism Assoc, municipalities, etc			2011	2012		
22	Network - Picnic Sites and Scenic Vistas	TBD	Prod Dev.	Regional Tourism Assoc, municipalities, etc			2011	2012	2013	
MARKETS & MARKETING										
23	Marketing Research	\$15,000 (visitor survey)	Marketing				2011			
24	Positioning - test and adopt graphic identifier	\$5,000	Coord Com		Summer & Fall 2009					
25	Image Bank	\$5,000	Marketing		Summer '09	Ongoing	Ongoing	Ongoing	Ongoing	

Rec #	Recommendation	Estimated Costs	Resp.	Support	Timing				
26	Regional Website – Portal	\$10,000	Marketing	Regional Tourism Assoc	Fall '09 -->	Ongoing	Ongoing	Ongoing	Ongoing
27	Consumer Promotion	\$25,000	Marketing	Regional Tourism Assoc	Radio 2009	2010	Ongoing	Ongoing	Ongoing
28	Travel Media and Trade	\$15,000	Marketing	Attractions, municipalities, groups (e.g. CTACA, RLA)		2010	Ongoing	Ongoing	Ongoing
29	Regional Operator Awareness	\$3,000	Marketing		Summer '09	Ongoing	Ongoing	Ongoing	Ongoing
30	Marketing Partnerships	Org Support	Marketing		Summer '09	Ongoing	Ongoing	Ongoing	Ongoing
31	Niche Markets -	Org Support	Marketing	Must be partnerships		Ongoing	Ongoing	Ongoing	Ongoing
32	Communication and Community Awareness	Org Support	Coordinator		Summer '09	Ongoing	Ongoing	Ongoing	Ongoing
Community Capacity Building / HR / Training									
33	Technology Capacity	Org Support	Product Dev.	Regional Tourism Associations		Winter 10- Ongoing	Ongoing	Ongoing	Ongoing
34	Tourism Operator Education & Training	TBD	Education & Training	Regional Tourism Associations	Fall '09 -->	Ongoing	Ongoing	Ongoing	Ongoing
35	Front Line Staff Education & Training	TBD	Education & Training	Regional Tourism Associations		Spring '10	Ongoing	Ongoing	Ongoing
36	Ambassador Program	TBD	Education & Training	Regional Tourism Associations		2011 -->	2012	Ongoing	Ongoing
37	Market Readiness Programs	\$25,000 (to be cost-shared)	Education & Training	Regional Tourism Associations		2010	2011	2012	2013
38	Regional Fam Tours	\$2,000	Education & Training	Regional Tourism Associations		June '10	Annually	Annually	Annually
39	Cultural Coast Best Practice Workshops	\$3,000	Education & Training	Regional Tourism Associations	Fall '09 -->	2010			

Coordination & Sub-Committees: Product Development, Marketing and Education & Training are working groups (sub-committees) of the Regional Coordinating Committee (Cultural Coast Alliance) Coordination Resources would be assigned to support the work of the sub-committees.

Estimated Costs: These are general estimates for initial work in the recommendations. These will need to be further explored and revised as initiatives are developed and do not consider possible government programs and/or cost sharing partnerships.

Org Support: Organizational support and coordination resources are required throughout the implementation process. In some cases, the major resource required is time and effort with project and material costs to be determined.

11. KEY DELIVERABLES and CONCLUSION

In summary, the key outcomes from this work are:

- A critical assessment of the potential for amalgamating New Brunswick's Greater South East Tourism Region and recommendations on how to develop a sustainable tourism.
- Analysis of relevant global and regional tourism trends and implications for the Greater South East Region.
- Categorized and clustered tourism product inventory and review of key tourism products, infrastructure and services.
- Identification of key target markets (scope, size, potential) as well as which products are best suited for these markets.
- Identification and prioritization of regional product development opportunities that will provide compelling tourism experiences (target market potential).
- Coordinated marketing approach (strategy, positioning and branding), including a limited library of promotional tools that can be later produced or implemented by the steering committee (i.e. digital artwork for a graphic identifier, a tradeshow booth (look and feel), a promotional ad for the *New Brunswick Travel Guide*).
- Recommended coordinating mechanism for implementing the plan, including the product development and marketing, building capacity, human resources and developing functional partnerships.

In conclusion, the results clearly indicate that New Brunswick's GSE should move forward with an alliance and use the recommendations noted in this strategy as a guide.

APPENDIX A: Steering Committee Members

Paul Boudreau, Town of Shediac
Rebekah Cant, Town of Sackville
Sabine Dietz, Cape Jourimain
Serge Doucet, Enterprise South East
Denise Lang, ACOA
Guy Léger, Enterprise Kent
Pierre Lemonde, Richibucto/Rexton/Saint-Louis-de-Kent Tourism Initiative
Judy Morison, Southeast Tantramar Tourism Association
Shelley Pisegna, New Brunswick Tourism and Parks
François Richard, Chalets Parc Aboiteau
Cécile Rousselle, RDÉE
Danny Woods, Kent Region Tourism Association

Special thanks to Danny Pellerin from Enterprise South East who coordinated the planning process on behalf of the Steering Committee.

Supported by the professional team of Tourism Synergy Ltd:
Laurel Reid, Ph.D. – team leader
Rachelle Richard-Collette, Ec. D. – economic development
Beth Kelly Hatt, Aquila Tours – port readiness and touring products
Bridget McGale, B. Des. – graphic design

Appendix B: SWOT of Pointe-du-Chêne Cruise Market Potential

Strengths

- Depth and width can handle small ships and expedition style cruises
- Authentic experiences around which to build tourism product within one hour of Port: Shediac, Acadian Heritage, Bouctouche Dunes, Pays de la Sagouine, Hopewell Rocks, fishing, lighthouses, beaches, lobster (fishing and eating), walking trails
- Accessible coastline and spectacular beaches, from white sand beaches to rocky shores
- Wharf commercial area exists with restaurant and gathering space
- Proximity of Shediac Bay Cruises as demand generator
- Positioned as one of the main wharves in “Célébrons nos quais”
- Services in place at the port, including stevedoring, water, power, sewage, etc
- Security plan, and ISPS Certification all in place at the port
 - New Port Manager being hired
- Safety - virtually no crime and no pollution
 - Warmth and friendliness of local people

Weaknesses

- Takes 3 to 5 years of concerted resources (HR and \$\$) to build the cruise market
- Lack of destination awareness
- Lack of marketing plan or strategy for building cruise tourism
- Little or no infrastructure at pier, such as washrooms, designated parking and transportation area for coaches, taxis, sidewalk, tourist information
- No infrastructure beyond port (i.e. few public washrooms throughout the region)
- Road access to port and traffic on pier. Pier would have to be closed to regular traffic during the 6 to 8 hours the ships would be in port (although this is slow in building and would only be on cruise ship days, and most are in the fall)
- Lack of local transportation (i.e. coaches, taxis, car rental) to move cruise passengers
- Access times to most regional sites is one hour, very few close by
- Lack of experience with cruise market
 - Not enough density of product within walking distance
- No packages developed for shore excursions

Opportunities

- Open markets could be set up in community for artisans to sell their merchandise
- Opportunity to encourage the development of new products and packages including soft adventure products, i.e. kayak, canoe, hiking, local cuisine and other experiences
- Shore Excursions developed could be applicable to markets other than cruise (i.e. bus tours, rubber tire traffic)
- Retail opportunities for selling souvenirs and other products that visitors may want to buy
- Marketing and branding of the region for cruise enhances other markets
- Learning from other Maritime small ports (for price points, best practices, etc)
- Develops entrepreneurship as many small businesses incubate from this new market
- Greater inter-municipal cooperation for whole region as benefits are wide ranging
- Plan for land use and organize for sustainable tourism
- Partnership development with outlining communities, other small ports, ACCA etc
- Employment for summer students

Threats

- Geographic location and proximity to ports like Charlottetown, Summerside and Miramichi (can also be an opportunity depending on how well work together and partner)
- Investment risk, (i.e. time, money)
- Limited ROI in first three to five years
- 900 paid Marina members and local fishermen may be resistant to the impact of cruise ship visits
- Local fishermen using piers may also be resistant
- Other close ports may be more “ready” and may have better marketability
- Container ship traffic may compete for same berth
- Pan Am wharf not deep enough for small cruise ships
- Similar products found in other ports in the region so need to find area uniqueness
- Summer students – while an opportunity in the summer, they return to classes before the busy cruise season in September and October -- Government funding limited for this market

Appendix C: L'Acadie (Atlantic Canada) Target Markets

Targeted by: The Commission du tourisme acadien du Canada atlantique (CTACA), 2009

#1 Market

Québec: 3.4 million residents from Montreal and Quebec City; 682,000 residents in Quebec City CMA; other regions: Montérégie, Bas-Saint-Laurent, Gaspésie, Saguenay-Lac-Saint-Jean, Mauricie.

Who?

- **35 years old or more;** annual income of about \$50,000, university educated;
- **Families:** beach vacations, interest in culture, nature; short hikes, national parks, site and attraction visits, interpretation cruises, nature observation.
- **Active young couples:** interest in culture, nature, food, festivals and ecotourism; short and long hikes, ocean kayaking, activities.
- **Baby-boomers:** interest in culture, nature, food, festivals and ecotourism; short and long hikes, inviting accommodations and restaurants, quiet relaxation in an evocative and exceptional environment and setting, nature observation, scenic drives, sea excursions.

#2 Market

USA: New England (Maine, Mass, Vermont and New Hampshire; then Louisiana and New Orleans; Acadians and Cajuns; State of NY

Who?

- 45 years old or more, annual household income of \$60,000, university educated.
- **Couples:** excursions and exploration for a first visit, Acadian connection, nature and nature observation; culture and tradition, genealogy, new experiences.
- American "eco-tourists"— some 30 million.

#3 Market

International: Francophone Europe: France, Belgium, Switzerland; Italy and Spain; England.

Who?

- European ecotourists
- 35-55 years old; stable income, university educated, average length of stay between 7-14 days.
- **Couples and families:** nature enthusiasts, national parks, wide open spaces, cultural sites, history, FIT and specialized groups, inviting accommodations, authenticity.

Appendix D: Markets: How They Book and What They Do

Tourism Attitudes and Motivations Survey (TAMS, 2006)

Table D-1: Planning and Booking Trips
(TAMS, 2006)

	Canada	US
Use of Internet for Planning	68%	77%
Use of Internet for Booking	46%	59%
Travel media	City lifestyle magazines, home & garden TV, News and current events media; Radio Stations (oldies, jazz/ big band, adult, contemporary music)	Educational, history TV (biography, history), news media (all news, talk, information, news, current affairs) and classical music radio stations.

Table D-2: US and Canadian Visitors to Atlantic Canada Activities (2006)

	Canada	US
Total # Overnight Trips to AC	2,594,391	
# of Pleasure Trips	1,928,287	3,154,797
	High Repeat Rate	
Origin	Quebec, Ontario	Maine, Other New England
Age & Marital Status	Older than avg. Cdn. traveler and married	Older than avg. US traveler and married
Education	More likely to have a university degree (38%)	More likely to have a post-graduate degree
Household Income	\$100,000 plus (34%)	Above average income.
Activities Pursued	Culture, entertainment, history-related activities; live art performances, literary and film festivals, wine, beer and food tasting.	Engage in educational activities (historic sites, museums, galleries) and cultural events (high art performances, theatre, film and music festivals)
	Participate in nature-oriented activities (wildlife viewing, hiking, climbing, paddling, wilderness activities) and fitness activities (exercising, jogging, cycling)	Active in outdoor activities esp. resort-based water activities (ocean based, sailing), cross country skiing and fitness.
	Have taken tours, cruises, esp. self-guided and organized, multi-location tours and scenic country drives.	Have taken tours and cruises (ocean, freshwater) multi-location, organized tours, tours of wineries, factories, casinos.
Accommodation Choices	Public campgrounds, lakeside, riverside or seaside resorts popular	Resorts (seaside, lakeside, riverside resorts). Activities and accommodation involving fine cuisine (wine, beer, food tastings; inns/ resorts with gourmet food)
Preferred Vacations	Culturally distinctive destinations with novelty, intellectual stimulation and learning opportunities to create long-lasting memories.	Vacations with novelty, opportunities to learn, intellectual stimulation; history and culture.
	Thus promote unique AC history, geography and culture.	Thus promote distinctive AC history and culture.

Table D-3: Fundy and Acadian Drives Activities Pursued
(Fundy and Acadian Drives, 2005)

Activities Pursued	Fundy Drive	Acadian Drive
Unplanned Activities		
Spent 1/2 to 1 day taking part in unplanned activities	40%	44%
Spent more nights than planned	15%	18%
Enjoy being outdoors and close to nature; not interested in high risk activities	58%	63%
Do things on the spur of the moment	45%	45%
Believe it's important to go somewhere new each year	38%	41%
	(low return potential)	
Are more comfortable with the familiar; like to feel "home away from home"	39%	38%

Appendix E: Regional Tourism Related Initiatives – Groups and Municipalities

Table E-1: Groups Involved in Tourism Related Activities

Group	Tourism Support	Tourism-Related Activities
Regional Tourism Associations (RTA's)		
Kent Region Tourism Association (KRTA)	<ul style="list-style-type: none"> - Regional membership association covering all of the Kent Region (over 25 years old) - Volunteer Resources (chair also on TIANB Board of Directors) - Divided into 7 zones - Over 150 members (fee: \$60 - \$500) including all municipalities, major attractions and operators - Annual Budget: \$12,000 - \$15,000 	<ul style="list-style-type: none"> - Publishes annual map / promotional piece - Regional web site - Annual Fam Tours for VIC staff - Special projects: registering GPS coordinates for all members - Annual Trade Shows attended by major attractions and RLA
Southeast Tantramar Tourism Association (SETTA)	<ul style="list-style-type: none"> - Regional tourism association covering the 4 municipalities of Sackville, Dorchester, Memramcook, Port Elgin (since 1998) - Membership fees: municipal contributions (\$500 - \$5,000), - Operator participation in activities - Annual Budget: \$12,000 - \$15,000 	<ul style="list-style-type: none"> - Regional web site - Published the Touring Tantramar Series - Publishes the annual 'things to do' in the Southeast Region (that also includes Shediac & Cap-Pelé) (cost: \$12,000)
Enterprise Agencies		
Enterprise Kent	Works in close collaboration with the KRTA	
Enterprise Southeast	New tourism development officer position (2008 – 2010)	
Linkages with larger regions		
Moncton	Go Moncton Partnerships <ul style="list-style-type: none"> - Attractions Program - Travel Trade Program 	<ul style="list-style-type: none"> - Some participate in one or both: Kouchibouguac National Park, Pays de la Sagouine, Olivier Soapery, Shediac Bay Cruises, Institut de Memramcook, Sackville
Regroupement du Littoral Acadien (RLA)	Marketing Partnership between the municipalities and attractions along the Acadian Coastal Drive	<ul style="list-style-type: none"> - Trade shows: - Fam tours *Memramcook recently joined
Museum Zones	Two zones in South East NB (including Moncton & Albert County)	<ul style="list-style-type: none"> - Francophone Zone - Anglophone Zone
National Parks & Sites	Chignecto Sites includes 5 sites	
Miramichi	Active Tourism Association and DMO	Rogersville participates and KNP
Fundy	<ul style="list-style-type: none"> - Fundy Coastal Drive - Fundy UNESCO Biosphere - Fundy National Park - Hopewell Rocks 	<ul style="list-style-type: none"> - Includes Memramcook, Sackville, Dorchester - Includes Memramcook, Sackville, Dorchester - KNP & Fundy joint initiatives - Some attractions do cross-promotion
Commission du tourisme acadien du Canada Atlantique (CTACA)	- Restructuring will match one of the five Acadian Region Zones	<ul style="list-style-type: none"> - Some operators participate in product club - New direction will include more cross-promotion
PEI		- Some operators (Cape Jourmain)
Nova Scotia		- Some operators (Port Elgin)

Table E-2: Municipalities and Tourism Activities

Municipalities	Tourism Support	Tourism-related Activities
- Beaubassin-Est (6,765 / \$398 M)	- Rural Community	- Participates with Cap-Pelé
- Sackville <i>Cultural Crossroads</i> (5,411 / \$ 464 M)	- Dept of Economic Development & Tourism - Tourism Advisory Committee - Tantramar Heritage Trust	- Cultural Capital in 2008, Partner with Moncton, Waterfowl Park also part of Bay of Fundy Recommended Experience - Many festivals and interpretation programs - Operates Welcome Centre - Trade shows: Moncton Home Show, Moncton Lifestyle Show, Ottawa, Quebec City * Halifax, Ottawa and Boston are key markets
- Shediac <i>Lobster Capital of the World</i> (5,497 / \$374 M)	- Department of Leisure Services - Local operators organizing tourism group	- Operates VIC, Giant Lobster & retail kiosks at Rotary Park - Participates in trade shows: (Saltscapes in Halifax in 09), Quebec, etc - Amphitheatre being examined
- Memramcook <i>La Belle Vallée</i> (4,638 / \$192 M)	- Community Development Officer	- Publishes regional brochure & map - Major Projects: ecomuseum concept - Memramcook Institute active in Go Moncton partnership, RLA, travel trade shows, etc
- Boucoute <i>Grand Petit Havre / Big Little Harbour</i> (2,383 / \$144 M)	- Boucoute Tourism Marketing Committee (town and major attractions)	- Operates VIC and Rotary Park - Contributes to Pays de la Sagouine operations - Kiosk at Moncton Lifestyle Show - Boucoute Guide: Pays de la Sagouine programming and new Boucoute section (since 2008) Total cost of guide : \$20,000 - New Community Action Plan (2009)
- Cap-Pelé <i>Au Coeur de l'Acadie</i> (2,279 / \$134 M)	- Department of Recreation & Tourism	- Operates VIC (new centre in 2009) - Participates in trade shows: Salon Fête du Québec, Saltscapes Expo in Halifax, Moncton Kiwanis Lifestyle - Organizing new festival in 2009
- Saint-Antoine <i>Petit village en campagne</i> (1,546 / \$72 M)	- Village Councillor sits on KRTA BofD - Recreation Department	- Municipal brochure - Coordinates community programming with local groups (trails, ski trails, Fall Festival, Music in the Park)
- Richibucto <i>Drop anchor with us</i> (1,290 / \$84 M)	- Participates in tri-community project (RRStL)	- Owns & Operates Jardine Municipal Park - Owns & Operates Rich Interpretative Centre and VIC - Major Projects: Chiefs Portraits & Art Centre, Downtown Development, Wharf Development
- Rogersville (1,165 / \$43 M)	- Village representatives on both Kent and Miramichi Regional Tourism Associations (pays 2 membership fees) - Local tourism committee with village and Chamber of Commerce	- Operates VIC in VIA Train Station - Participates in local programming and activities at Monument, festivals, music in the park - Working on new Community Development Strategy - Major Projects: Lac Despres Recreation Site and Ocean Spray Cranberry Site
- Dorchester (1,119 / \$35 M)	- Active in historical projects	- Westmorland Historical Society very active restoration and interpretation projects - Operates a VIC
- Saint-Louis-de-Kent <i>Berceau du Drapeau Acadien</i> (960 / \$ 40 M)	- Participates in tri-community project (RRStL)	- Owns & Operates Daigle Campground - Major Projects: 125 th Celebration of Acadian Flag in 2009, Acadian Flag Interpretation Centre
- Rexton <i>History, Nature, Progress ... In Harmony ...in Rexton</i> (862 / \$48 M)	- Village has new Economic Development Officer involved in tourism - Participates in tri-community project (RRStL)	- Operates Bonar Law Historic Site (management agreement with province) - Major Projects: Bonar Law new developments, Tall Ships Interpretation Centre
- Port Elgin (451 / \$18 M)	- Community development support	- Current projects: trails, new visitor kiosk, wharf - Linkages with Nova Scotia

- Tri-community tourism project (RRStL) has a project manager (2- 3 year project with Enterprise Kent)
- Many municipalities operate community park sites and organize programming activities

Appendix F: Suggested GSE Touring Products

1. Be An Acadian For The Day: *Stimulate Your Senses*

You will experience local, authentic, hands on experience with interpreters from the beginning to the end of your day. You will be immersed in l'Acadie's Joie de Vivre.

Live the history and traditions and taste your way through l'Acadie.

SEE:

Lobster cages being made
Fishing nets being repaired
The lobster fleet ready to set sail
The sunsets on the coastal shores

TOUCH:

The sand, the sea, the sweet rain, a sun kissed wildflower
Hold a lobster, an oyster, catch a mackerel

TASTE:

The seafood, local Acadian dishes, local wines, cheeses
visit an Acadian kitchen and help prepare a 'fricot', a poutine râpée' a 'pet de soeur' and sit down and savour.

HEAR: The playing of violins to the rhythm of lively Acadian music as you learn to play wooden spoons and tap your feet at the same time. Enjoy the roar of the sea waves, the quiet of the sunset over the water, the sails jangling against the mast of boats, children laughing on the beach. Hear the quiet of the night.

SMELL: The ocean and fresh sea air, the herring smoking in the smoke houses, the brown sugar and butter melting as the 'pets de soeurs' are baking, maple syrup as its boiling, the summer savory infusing the chicken fricot.

This tour would be guided or self-guided. There would be options to incorporate small or large areas depending on the length of the tour. It would include Acadian attractions and communities, such as Memramcook, Shediac, Cap Pelé, Bouctouche, St-Antoine, Rogersville, St-Louis, Richibucto and others.

2. SEAFOOD OF L'ACADIE

DAY 1

- Visit Kouchibouguac National Park (Interpretation Centre, voyageur canoe, clams, quahougs)
- Optional tasting(s) at Le Pays de la Sagouine or at various other restaurants
- Visit Le Pays de la Sagouine

DAY 2

- Boat Tour with on Shediac Bay with interpretative fisheries experience.
- Visit an authentic herring smoke house with product tasting.
- Lobster boil at Park Aboiteau Beach with Acadian music.

3. HERITAGE TOURS

This tour would be a perfect opportunity for a 'heritage trail' which could eventually be a map. This should be more than a list, rather a self-guided itinerary that allows visitors to choose what they want to do along the route.

- Rogersville-Assumption Monument
- Acadieville-Little Big Bear Safari
- Kouchibouguac National Park
- St-Louis-de Kent – Birthplace of the Acadian Flag
- Richibucto- Interpretation Centre (History) (First Nation)
- Banner Festival – Richibucto/Rexton/ Saint-Louis
- Richibucto-Wharf
- Rexton-Bonar Law-Tea Time-Farmers Golf-Tall Ships
- Bedec- Oysters
- Richibucto Village-Hudson Oddities
- Chockpish-Soapery
- St. Edward-Seawind Buffalo Safari
- Bouctouche Bay -Dune de Bouctouche
- Bouctouche - Pays de La Sagouine
- Grande Digue – Pioneer Museum
- Shediac-Giant Lobster & Parlee Beach

4. SURF AND TURF SAFARI

This would be designed for an inbound tour company. This might also be a self-guided tour as these places are all open to the public.

Begin your bus tour in Aulac at the New Brunswick visitor center and drive along a musical, delicious, cultural region. See the sea, the marches, and the rivers, hear the music and taste the regional cuisines.

- Aulac
- Beaubassin- cultural heritage
- Shediac (by boat)- lobster
- Bouctouche- Pays de la Sagouine
- Richibucto-
- Saint –Louis-de Kent
- Kouchibouguac
- Rogersville – cranberries-
- Sainte-Anne-de-Kent
- Memramcook
- Dorchester
- Sackville

5. SHELLFISH EXTRAVAGANZA

JUNE TO SEPTEMBER 2 DAY TOUR

WHAT TO DO	WHAT TO SEE	WHAT TO BUY
Fishing-lobster-quahogs, clams, oysters	Interpretation of oyster-quahogs-clam cultivation	Seafood meals
Boat tours	Local musicians and entertainment	Local wines
Do it yourself clam bake on the beach	Cooking demonstrations	Shellfish Recipe books
Heritage and cultural sites visits		Pictures and souvenirs
Walk on the beach at low tide		
Interactive participation in Acadian food		
Cook and eat what you fish		
How to open and eat an oyster		
Visit fish markets/		
Romantic oyster weekend		Accommodation

How: Partnership with accommodations and others

Who: Tour company to sell packages

Market: Adults/friends/groups

6. EAU! GET WET ! GET WILD!

TOUR TO BE MARKETED TO AMERICAN FAMILIES WITH KIDS OF 12 AND 14.

DAY 1

- Start at Kouchibouguac Park on a Voyageur canoe and see the seals and terns from cap St. Louis Wharf.
- Lunch on traditional Acadian dishes at le Pays de la Sagouine.
- Take an afternoon oyster fishing tour in Bouctouche or a lobster cruise on Shediac Bay.
- Check in to a cottage at Aboiteau beach. Enjoy the wharf, a campfire and the water.

DAY 2

- Lunch at Cape Jourimain
- Visit Silver lake and Sackville's Waterfowl park
- Salmon supper at the Bell Inn
- Groove to the Blues at Georgi's Roadhouse.

WOW! TOUR CHOICES

- Driving tours: birding tour, museum tour
- Water tours: visiting communities by boat
- Scenic tours: getting off the beaten track
- Artisans tour
- Bicycle, boat and carriage tours.
- Kayak tour
- Seafood dining

HOW:

WWW.WOW.NB.CA

NOTE: a 7th idea was suggested as a Pavilion Concept that would travel around the Region