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UPPER ST. JOHN RIVER VALLEY TOURISM DEVELOPMENT INITIATIVE -- A Product and Market Development Strategy



Submitted to
The Department of Tourism and Parks
by
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EXECUTIVE SUMMARY

UPPER ST. JOHN RIVER VALLEY TOURISM DEVELOPMENT INITIATIVE -- A Product and Market Development Strategy

Introduction

The new Trans Canada Highway (TCH) running parallel to the St. John River has meant that measures must be taken to ensure that the Valley has a strategy for growing tourism. As a result, the New Brunswick Regional Development Corporation (RDC) and Department of Tourism and Parks (TAP) commissioned the Upper St. John River Valley (SJRJV) Tourism Development Initiative -- a 3-5 year product and market development strategy, aimed at increasing visitation and creating new touring products to draw visitors off the highway and lengthen their stay.

This report explores the sustainable tourism development potential of the Upper SJRV, a region that extends from the Edmundston area in the north to the Fredericton area in the south. The report first details the project objectives and deliverables, approach used and key findings, which are highlighted below. Finally, the major recommendations that make up the Product and Market Development Strategy are presented, along with an Implementation Timeline.

Two separate documents accompany this report:

1. **The Appendixes and Tools:** which provide more detailed information, tips and tools associated with respective portions of the report. These sections are cross-referenced.
2. **A Categorized Tourism Product Inventory:** look at specific product components of the Upper SJRV.

Project Objectives

Several project objectives were identified as important in developing the Upper SJRV tourism initiative. Ultimately, the aims of the project are to:

1. Increase tourism visitation revenues.
2. Provide communities with sustainable tourism planning and product development (models).
3. Assist in building strong tourism product(s) focused on the River Valley experience for the Province to take to market.
4. Suggest new natural and cultural products in the St. John River Valley.
5. Stimulate economic benefits for local communities and businesses.
6. Serve as a model for other River Valley communities, and
7. Foster partnerships between Upper River Valley communities and the Province.

Deliverables

There are several project deliverables contained in the Report, Appendixes and Tools. These deliverables include:

1. An overall master plan of the Upper St. John River corridor illustrating the natural and cultural inventory as well as potential new tourism product areas, based on identified themes and clusters.
2. An applied model for evaluating tourism products that can serve as a prototype for future use.
3. An evaluation of the touring routes with a plan for upgrading.
4. A plan for each community to develop a sustainable tourism product development strategy.
5. Theme, brand and logo reflecting the unique character of the St. John River Valley.
6. A media plan specifying the most effective media for promoting the Valley.
7. Benchmarks that will assist in measuring sustainable development progress over time.
8. Strengthened partnerships between communities and the Province.
9. A model for sustainable tourism planning and development.

The Approach

The approach to devise the Upper SJRV tourism strategy included consultation with industry and communities located in the Valley. The methodology also involved numerous Valley visits as well as secondary research in order to assess market and associated product needs. Following is a summary of the steps taken to develop the strategy. The steps taken to develop the strategy are noted below.

- Over 75 interviews were conducted with community tourism stakeholders in the Upper SJRV to set the stage for the analysis.
- Secondary research was conducted to obtain a sense of what had been previously completed in the Valley as well as to establish priority markets.
- Two community workshops were held to provide feedback on the focus and subsequently key recommendations (January-February and May 2004).
- Several meetings were held with the Steering Committee who provided guidance and direction.
- Tourism market and product development needs were analyzed
- A strategic approach was formulated in the form of recommendations presented below.

Key Findings

The following points summarize the key findings resulting from the interviews, research and analysis phases of the project.

1. Markets & Marketing

Although several regions and individual communities undertake marketing, the USJRV lacks a coordinated marketing strategy. Identified target markets are:

- a) **Primary Markets:** 1. Locals, 2. Quebec and Ontario Touring markets,
- b) **Secondary Markets:** 1. Regional Market (Maritimes), 2. New England Market, and 3. the Snowmobile market.
- c) **Developmental Markets:** 1. Meetings, Conventions, Sporting Events; and 2. Special Interest Niche Markets, including (in priority order): 1. Golfers, 2. Cyclists, 3. Travel Learn Market, 4. Walkers/Hikers 4. Golfers, 5. Art Lovers/Enthusiasts, 6. Cross-Country Skiers, 7. Naturalists, 8. Sport Fishing/Anglers.

In terms of marketing efforts, the analysis reveals that there is:

- There are many market trends that have an impact on travel which are outlined in the report.
- Limited Coordination or Cooperative Marketing (some Consumer shows)
- No SJRV Website presence
- Little Participation in Provincial Publications (the main distribution coverage)
- Few if any benchmarks to assess success

2. Positioning and Branding

As a tourism Region, the USJRV lacks a destination position, brand and cohesive image. Consequently, the goals of the positioning and branding process are to: 1. encompass the size, character, flavour and diversity of the SJRV, and 2. differentiate the Valley from other River Valleys and Maritime destinations. Several proposed themes will be tested throughout the summer of 2004, along with adjectives, photographic images and calls to action. The themes are:

- *The Grand River of Canada's East Coast*
- *Eastern Canada's Grand River Valley*
- *Majestic Waterway of Atlantic Canada*
- *The SJ River... Majestic Waterway to the Sea*
- *The SJ River: A Beautiful Stretch of History*
- *Grand and Ancient Waterway to the Sea*
- *Magnificent (Majestic) Riverway to the Sea*
- *River Valley of Grand Discoveries*
- *The SJ River ... "Appalachia to the Atlantic"*

Key Findings (Cont'd...)

3. Tourism Products and Experiences

- **St. John River Watershed:** With the exception of the St. Lawrence, the St. John is the largest watershed feeding into the Eastern Seaboard of North America's Atlantic ocean.
- **Urban Hubs:** Four urban hubs offering several traveler services (riverside rest stops, food, lodging) exist in the Upper SJRV: Edmundston, Grand Falls, Woodstock, Fredericton.
- **Key Demand Generators/Attractions** (*generate tourism demand, in and of themselves; often not self-sufficient*):
 1. **Fall Foliage:** strong Motorcoach season; can be lengthened with additional value-added experiences.
 2. **Le Jardin Botanique:** low visitation; will be enhanced by addition of the Mosaiculture Exhibit (8 giant plant mosaics) in 2005 and 2006.
 3. **Grand Falls Gorge:** highest visitation in Valley; underused, undersold; geological interpretation and on-site experiences need strengthening.
 4. **Hartland Covered Bridge:** high visitation; 20 minute stopping time; needs critical mass of activities/experiences to lengthen stay.
 5. **Kings Landing:** low visitation, high educational value; financial sustainability strategy underway.
 6. **Mactaquac Provincial Park:** serves as a key draw for locals and the Regional market.
 7. **Historic Garrison District:** key downtown draw for Fredericton; serves as a strong hub for other experiences, activities and spots outside of the City.
 8. **Kingswood Park/The Lynx:** undersold; family oriented Kingswood Park has year round tourism potential; the Lynx is one of three premier Signature courses in the Province, attracting high-end markets.
 9. **Key Festivals:** La Foire Brayonne (Edmundston); Fredericton Jazz and Blues Festival ; there is no major event in August, Fall or Spring.

A market-readiness assessment tool is provided to identify areas of strengths and weakness for each major attraction.

- **Demand Supporters** (*stimulate a visit while in the area*)
 1. **Strong Visual Artists/Artisans/Crafters:** in several communities, including Edmundston, Grand Falls, Hartland, Woodstock and Fredericton.
 2. **Cultural Celebrations:** Festivals/Events, Theatre, Stories abound.
 3. **Little to No river Access or Use:** by locals or visitors, through tours or activities.
 4. **Three Strong Cultural Groups:** 1. **French:** Edmundston and surrounding République de Madawaska, Grand Falls and Fredericton areas; Madawaska in particular, has a unique and thriving culture with affinity to Quebec and Maine; 2. **English:** from Grand Falls south to Fredericton areas, Scottish and Irish descent, and 3. **Maliseet First Nations:** five Aboriginal locations with strong cultural traditions.
 5. **Universities of the Valley:** These centres of higher education are focusing on creativity, innovation and excellence and attracting new Canadians, multiculturalism and facilities that can be better used and showcased as attractions. Université de Moncton (Edmundston), New Brunswick Community College (Edmundston, Woodstock, Fredericton), the University of New Brunswick, St. Thomas University, College of Craft and Design.

Key Findings (cont'd...)

3. Tourism Products and Experiences (cont'd...)

- **Demand Supporters (cont'd...)**

6. **Existing Clusters:** 1. **Museums (Network):** several small museums clustered throughout the Valley in two museum zones; 2. **Golf Courses:** 12 of varying types and sizes; 3. **Covered Bridges:** several particularly in the Hartland area.

7. **Sentier NB Trail:** 400+ kms. Links communities and is the most developed in NB.

8. **River Communities and "River Greens":** River front picnic areas in almost ALL communities boast close access to nature and built heritage backdrops; often serve as Trail Heads for trails on former rail beds. River Greens are key Community Focal Points that can serve to stimulate economic spin-offs since they are close to shops and services.

- **Traveler Services:** Traveller services include the elements required by visitors when they are at the destination. Findings reveal the following information

- **Accommodations:** Very few "5-star"; some are dated; seasonality is an issue.

- **Restaurants:** Seasonality (less open in shoulder and off-peak seasons) and quality are an issue; very few fine dining (except Fredericton); some character food "spots"; no one offers potato dish varieties or recipes; local cuisine not widely featured.

- **Infrastructure:** Many closures during winter months (esp. of Attractions).

- **Signage:** Both Community signage (consistent with brand/theme) and highway signage are required – as parts of overall approach.

- **Information:** Communities take little responsibility for information provision either:

1. In Advance, or 2. En-route/On-site). No consistent "Valley" presence.

- **New or Planned Tourism Products/Services**

Edmundston Area

- Full Service Irving Gas Station being planned at Exit 8.
- New Sports and Recreation Centre planned for 2006-07
- Tourism Planning Exercise underway (OTEM)
- Cultural/heritage assessment (Quebec/Labrador foundation)
- Circuit patrimonial touring route self guided itineraries (Upper Madawaska and Edmundston Region)
- Permanent exhibition on the Atlantic Forestry Industry (Parks Canada et le Musée du Madawaska - \$500,000)
- Self Guided Itineraries being developed

Perth-Andover:

- Upgrades to municipal VIC, new shops, kids area

Grand Falls area

- New marina/multi-functional facility (water access)
- Cultural Centre and Farmers Market (\$1.5 million)
- Plans for new Civic Centre (two ice surfaces)
- Petite Rivière: watershed preservation, nature observation, trails
- Art symposium 2004
- Refocus on trail system

Florenceville:

- Potato World (Attraction)

Hartland

- Hartland Waterfront Enhancement
- Covered Bridge Driving Tour Loop Map

Woodstock:

- Meduxenkeag Greenway Project on waterfront (\$800,000)
- New VIC at Beardsley Road Esso

(Continued...)

Key Findings (cont'd...)

3. Tourism Products and Experiences
(cont'd...)

- **New/Planned Tourism Products**
(cont'd)...

Fredericton area:

- Fort Nashwaak development
- Kings Landing: Interpretation of life of Maliseet & Settlement.

Madawaska Maliseet First Nation

- Eco-tourism study underway (interpretive centre, trails and campground).
- First stages completed: fish hatchery & fish-out pond.

Tobique First Nation

- First Nation Big Stop under construction
- Funding received for Strategic Plan for Maliseet Interpretation Centre (Heritage Village)

Kingsclear First Nation

- Maliseet Interpretive Centre (final planning stage)

St. John River Valley Tourism Association

- Mid-River Valley Map (2004)

4. Tourism Organization and Partnerships

There are over 50 organizations involved in tourism development and/or promotion in the Upper SJRV. Although there are a significant number of organizations, there is very little of coordination between the various groups. Partnerships are beginning to strengthen as parts of the Valley and businesses realize tourism must be developed in concert with partners.

Recommendations

Forty-three recommendations complete the report and are summarized below. An Implementation Timeline accompanies these strategic recommendations in the Report.

OVERALL RECOMMENDATIONS	
1	Coordinating Committee: Create an ad hoc Valley Coordinating Committee to be responsible for implementing the plan.
2	Choose Champion: to represent the area and speak on its behalf; this is fundamental to community development.
3	Atlantic Canada - Provincial Gateway: Position the entry point as a gateway to the Maritimes.
4	Touring Destination: Position the SJRV and a superb touring destination.
5	Adopt Benchmarks to monitor development success.
MARKETING RECOMMENDATIONS	
6	Marketing Task Force: should be created to serve "under" the Coordinating Committee and implement the strategy.
7	Pursue Target Markets: key markets identified above.
8	Intercept Travelers: Use as a key, multi-faceted strategy, including "pre-visit", "en route" and on-site intercept.
9	Define positioning and finalize brand for the Upper SJRV
10	Develop and implement the Upper SJRV brand.

	MARKETING RECOMMENDATIONS (cont'd.)
11	Improve the Upper SJRV Profile
12	Employ travel media to enhance profile.
13	Use the Web to promote the Upper SJRV.
14	Participate in cooperative marketing programs.
15	Distribution: Strengthen the current distribution system to include new outlets in the Valley.
	TOURISM PRODUCT RECOMMENDATIONS
16	Strengthen Existing Demand Generators
	a) Fall Foliage and Spring Sugar Bush: Continue to feature autumn colours and cross promote with spring sugar bush options
	b) Potato Interpretation: attempt to theme and link potato farming to dining ("... from production... to plate")..
	c) Le Jardin Botanique: profile and create awareness of Mosaiculture Exhibit.
	d) Grand Falls Gorge: feature as the Signature Nature Attraction in the Valley; strengthen geological interpretation, tours, parking.
	e) Hartland Covered Bridge: gradually develop critical mass of activities/experiences to lengthen stay (e.g. dinner theatre, restaurant).
	f) Kings Landing: sustainable funding strategy underway; highlight strong education and high quality seasonal cuisine programs.
	g) Kingswood Park - The Lynx: strengthen profile as a "must see" attraction; target Kingswood to the family market and the Lynx to high-end golfers.
	h) Historic Garrison District: continue to promote as downtown draw and hub for other experiences, activities and places in area.
	i) Key Festivals: Continue to grow major festivals. Consider a Valley event in August, Fall and/or Spring when there are none.
17	River Greens: support and develop the River Greens community access strategy.
18	a) Trails Focus: place more emphasis on developing and promoting the trail, particularly in areas where not connected.
	b) Trails Map: work with trail providers to offer maps and guides for sale at key distribution points.
19	Cycling Event: Plan a major biking event for 2006 in order to showcase the trail.
20	Event Calendar: produce a comprehensive event calendar for the valley.
21	EcoMuseum Concept: Consider creating the SJRV Ecomuseum – combine existing museums & heritage sites under one umbrella.
22	Scenic Lookouts: Develop plans for re-design of existing scenic lookouts and identification of possible new sites.
23	River Product Delivery Training: Set up a pilot training project aimed at providing training to young people wishing to start culture and soft adventure businesses on the river.
24	Studio Map, Route Open Days: Develop a Valley studio map "passport" that includes a route and identified "open month".
25	Species Lists: Partner with Fallsbrook Centre to make species lists widely available (for sale).
26	Scenic Drive Landscape Mgmt. Plan: Develop a landscape management plan for the Upper SJRV.
27	Feature Post Secondary Institutions as attractions (demand supporters) in their own right.
	PACKAGING-RELATED RECOMMENDATIONS
28	Character Inns & B&B Packages: Package within the Provincial Getaways with web link and photo in Travel Guide.
29	Self-Guided Itineraries: Develop self-guided itineraries to permit exploration of the Valley.
30	Travel Learn Packages: Develop one new Travel Learn Package per year; product can then be extended to general market.
31	"Building Packages" Workshop: Offer a packaging workshop for operators.
32	Provincial Publications Buy-In: Seek a less expensive alternative to allow smaller operators to buy in to the Provincial Travel Guide.
	TRAVELER SERVICES RECOMMENDATIONS
33	Provincial Visitor Information Centre: Explore moving the northern Provincial VIC to the St. Jacques exit, where a new full-service gas station is planned.
34	Signage
	a) Highway: Continue to pursue/lobby for additional highway signage.
	b) VICs, Big Stops, Gas Stations: Produce several large format maps and accompanying posters for placement at these venues.
	c) Communities: Develop coordinated signage approach for entry ways. Ensure "River Greens" are appropriately signed.
35	Off-Peak Visitor Information: Position town and village offices as "explicit" Information Centres during off-peak seasons.

COMMUNITY RECOMMENDATIONS	
36	Community Experts Inventory: Inventory the "expertise" in each community and willingness of experts to share skills with tourists.
37	Valley Ambassador Program: Develop a Valley Ambassador Program aimed at educating locals about tourism.
38	Community Uniqueness & Interpretation: Identify and build on unique "selling points" for each Community.
39	First Nations Communities: Communicate and work with First Nations Bands; potential to offer an intriguing cultural product.
40	Beautify Communities: Seek to improve facades, green space, beautify downtown areas, parks and River Greens. Built heritage communities should set the stage for these efforts.
41	Community Interpretation Training: Train community heritage groups to develop and interpret unique Community features.
42	Individual Community Infrastructure: Several recommendations for individual communities are made in the Appendix P .
43	Municipal Planning Policies: Develop policies to manage development along the scenic drive.
PARTNERSHIP RECOMMENDATIONS	
44	Regional Partnerships: Form strong regional partnerships.
45	CEDA Assistance Role: Assist with expertise and infrastructure funding for tourism where required.

Conclusion

This strategic tourism product and market development plan delineates the approach to be used for sustainable tourism in the Upper SJRV and provides the steps to be taken over the next 3-5year period. The report maps out the strategy to be used to increase tourism visitation and revenues to the Valley and provides communities with a road map for how to achieve sustainable tourism through long-term planning.

New natural and cultural products, themes and clusters are suggested for the Valley as well as an applied model for evaluating tourism products (market readiness evaluation tool), which serves as a prototype for future use. In addition, communities now have a road map for improving individual sustainability and appeal. Benchmarks that will assist in measuring sustainable tourism development progress over time are also provided.

It is hoped that by implementing this strategy, the Upper St. John River Valley will create a sustainable tourism destination over the next 3-5 years that serves as a model for other Atlantic Canada and River Valley communities.

1. INTRODUCTION

Located in Western New Brunswick, the St. John River and its tributaries drain a basin of more than 55,000 km². Just over half the watershed lies in New Brunswick, one-third is in Maine and another 13% is in the province of Quebec.

Apart from the St. Lawrence, the 673 kilometre St. John River (404 miles) boasts the longest river and largest watershed draining into North America's Atlantic Seaboard. The River's source in northern Maine flows southeast below Edmundston, past Grand Falls, Woodstock and Fredericton to the outflow in the Bay of Fundy at Saint John. Chief tributaries are the Aroostook and Tobique.

The Maliseet Indians called it the *Wolastoq*, the "good and bountiful river". Samuel de Champlain gave the River its current name in 1604 when he dropped anchor at the River's mouth on the celebration day of St. John the Baptist. Celebrations marking this event are planned throughout Atlantic Canada in 2004.

It is a river system that has nurtured the growth and development of three cultures: the Maliseet First Nation, French and English. Forming part of the Maine-New Brunswick border, in the 17th and 18th centuries the River was an important route for French, Aboriginal and English traders with several trading posts established on its banks. The cultural diversity spawned by the River is evident in its languages; French is dominant in the Republic de Madawaska and English is mainly spoken from Fredericton to Perth-Andover. Grand Falls bridges the gap with an equal combination of both languages. The Valley later became a major lumber transportation route and catered to the Steamboat trade.

Three major dams at Grand Falls, Beechwood and Mactaquac have created large reservoirs and recreation areas – but have limited River navigation and access. In between these dams, the River is virtually "unspoiled" – but the traditional farming base has rendered a culture that does not use the River for recreation. Potatoes represent the major crop and several festivals are planned around the potato theme.

The natural features, trails, historic sites, festivals, events and art of the River Valley are the products of its heritage. The mix of cultural and natural features creates a unique and majestic River Valley that separates it definitively from other destinations appealing to the same target audiences.

Report Focus

This report explores the sustainable tourism development potential of the Upper St. John River Valley (SJR). The report first details the project objectives then... the destination highlights, the situation analysis and results from tourism stakeholder workshops. Key destination elements are then analyzed and key findings presented.

Finally, a comprehensive marketing and product development strategy is put forward in the form of realistic recommendations for sustainable tourism development in the Upper St. John River Valley.

Two documents accompany this report:

1. The **Appendixes**, which provide in-depth information on respective portions of the report. These sections are cross-referenced.
2. The **Categorized Tourism Product Inventory**: look at specific product components of the Upper SJRV.

2. PROJECT OBJECTIVES

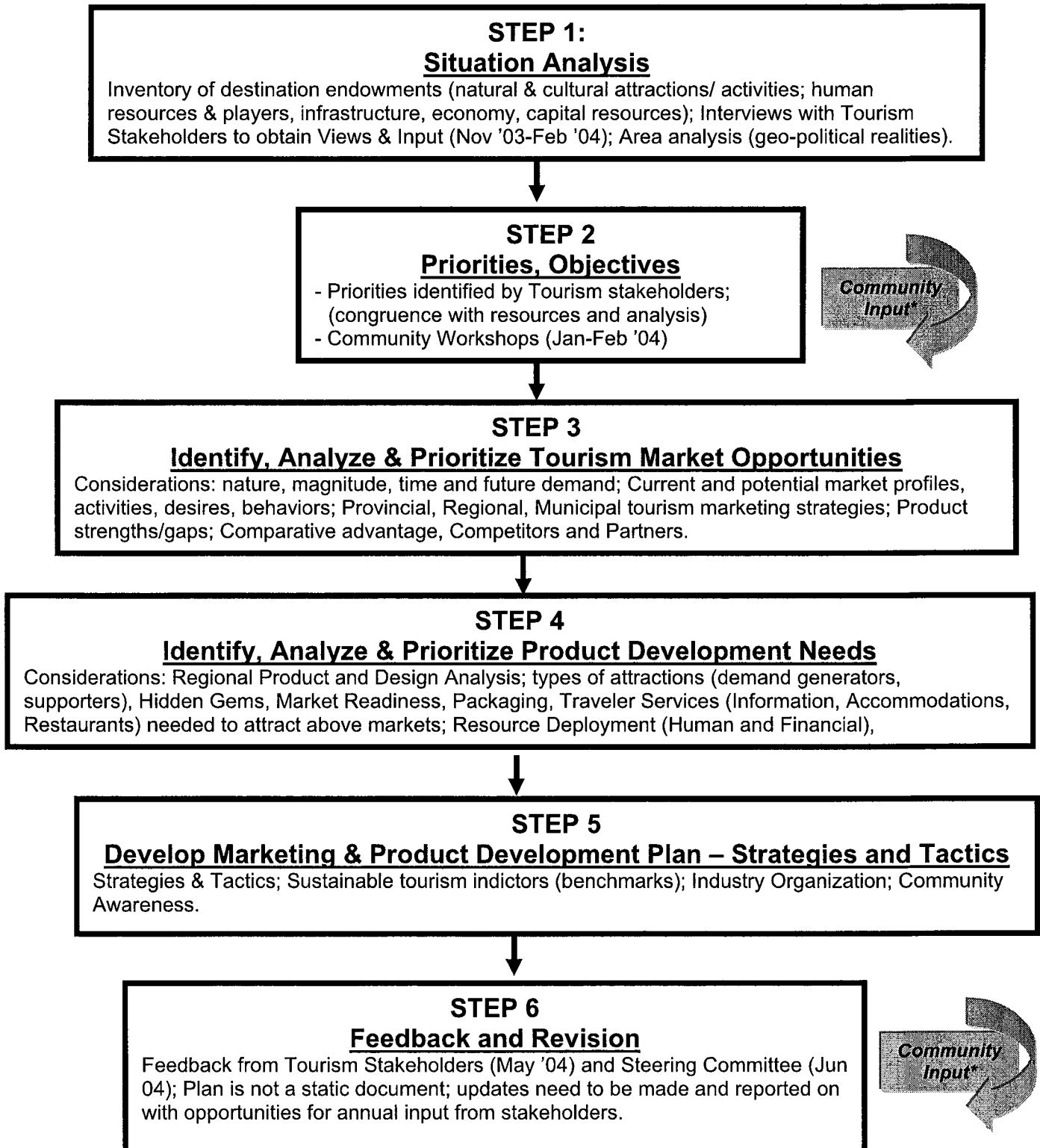
The tourism development initiative for the St. John River Valley and surrounding areas will:

1. **Increase tourism** visitation revenues.
2. Provide communities with **sustainable tourism planning and product development** (models).
3. Assist in building **strong tourism product(s) focused on the River Valley experience** for the Province to take to market.
4. Suggest **new natural and cultural products** in the St. John River Valley.
5. **Stimulate economic benefits** for local communities and businesses.
6. Serve as **a model for other communities**, and
7. **Foster partnerships** between Upper River Valley communities and the Province.

3. PROJECT DELIVERABLES

1. An **overall master plan of the Upper St. John River corridor** illustrating the natural and cultural inventory as well as potential new tourism product areas, based on identified themes and clusters.
2. An **applied model for evaluating tourism products** that can serve as a prototype for future use.
3. An evaluation of the **touring routes** with a plan for upgrading.
4. A plan for each **community** to develop a **sustainable tourism product development** strategy.
5. **Theme, brand and logo** reflecting the unique character of the St. John River Valley.
6. A **media plan** specifying the most effective media for promoting the Valley.
7. **Benchmarks** that will assist in measuring sustainable development progress over time.
8. **Strengthened partnerships** between communities and the Province.
9. A **model** for sustainable tourism planning and development.

4. PROJECT APPROACH



* Overview of Community Input Obtained throughout this Process is found in *Appendix A*.

5. THE CONTEXT/ SITUATION ANALYSIS

5.1 Sustainable Tourism Development in the Upper St. John River Valley

Sustainable community tourism is the key foundation upon which the St. John River Valley Tourism Initiative is based. Sustainable tourism development seeks to merge the economic benefit of business development with efforts to enhance the social and environmental attributes of the community – in the long term. Key components are shown in **Figure 1**.

Figure 1: Key Elements of Sustainable Community Tourism



Five principles guided the Upper St. John River Valley plan development:

1. **Integrated and Long-Term Planning**: where tourism is integrated with other economic sectors, is planned for and managed and follows a long-term vision.
2. **Community Benefits, Involvement, Collaboration**: Stakeholder involvement, respect for local views and culture, wide community participation, partnerships and cooperative action; volunteerism a key component; tourism must improve the visual and physical environment, supports local culture, adds recreation opportunities, offers local economic opportunities and improves the quality of life.
3. **Economic Development**: use tourism as a strategic economic development tool; establish a critical mass of authentic attractions and support services, based on the local culture and environment and establish a well-trained labour pool.
4. **Managed Growth**: involving planned tourism activities that balance the needs of the environment, host community and visitor, with built-in performance measures to evaluate progress.
5. **Resource Protection**: for conserving and preserving environmental and cultural resources.

5.2 The Valley Overview

The St. John River is a waterway covering a broad range of natural and cultural features. As it travels along the Upper Valley, the River influences forestry, agriculture, recreation, as well as transportation and community development. Its place as an international boundary has influenced the ways of life of three cultural groups: the Maliseet, French and English. A Valley overview is presented in **Table 1**.¹ Tourism development efforts have been fragmented in the past as most areas of the Valley have benefited from other stronger economic sectors.

For the purposes of this tourism development plan, the many communities along the Upper St. John River Valley are clustered around four major Urban Centres, which act as tourism hubs for marketing and product development (**Table 2**).

A more detailed overview of each Urban Hub is presented in **Appendix B**. **Appendix B** also presents the uniqueness of each community and the Regional organizational capacity to develop, manage and market tourism.

Table 1: Valley Snapshot

- **The Region as a Destination:** The Upper St. John River Valley can be “sold” as a destination – only if it bills itself collectively as a superb touring destination and uses the existing River Valley Scenic Drive designation as a focal and unifying feature. This already-established designation takes advantage of current highway signage, the River Valley route logo, permits a logical “connection of dots” (towns and villages en route) and the NB Trail that travels along the River’s shores. The River Valley Scenic Drive approach is also consistent with the Provincial tourism focus on the “rivers and inland waterways” product.
- **Urban Hubs:** A Region with four Urban-area hubs (Edmundston, Grand Falls, Woodstock and Fredericton) and a limited number of compelling and distinctive core attractions (*demand generators*).
- **Attractions/Activities: Provincial “Must See & Do”** (Five are within 2.5 hour drive.)
 - a) **Nature:** 1. Grand Falls Gorge, 2. Mactaquac Provincial Park, 3. N.B. Botanical Garden; 4. de la République Provincial Park.
 - b) **Culture & Heritage:** 1. Kings Landing Historical Settlement, 2. Beaverbrook Art Gallery, 3. Hartland Covered Bridge, 4. Historic Garrison District, 5. Christ Church Cathedral, 5. Legislative Assembly, 6. Old Government House.
 - c) **Family Fun Attractions:** 1. Hartt Island RV Resort, 2. Kingswood Park
 - d) **Key Profiled Festivals:** May: Salon de la Forêt, June: Edmundston Jazz and Blues, July: NB Highland Games & Scottish Festival, La Foire Brayonne, Woodstock Old Home Week, September: Fredericton Exhibition, Harvest Jazz and Blues Festival.
- **Product Development and Renewal:** While not historically strong, significant new investment has been committed to create additional jobs & tourism revenues in specific pockets of the Region. Two large-scale attractions are in the works (Potato World and Maliseet Interpretation Centre) and all-service gas stations are being built to service traffic on the new Trans Canada Highway (TCH). (Full list of new tourism projects and initiatives provided in *Appendix H*.)
- **Tourism Marketing:** With the exception of Provincial tourism publications, overall marketing of the Upper St. John River Valley is very fragmented with few municipalities working together. Some relatively new destination marketing organizations (DMO’s) are active (Office du tourisme Edmundston-Madawaska, Fredericton Tourism, Grand Falls Falls and Gorge Commission). The Upper St. John River Tourism Association is attempting to pull together communities from Nackawic to Grand Falls - will need to bridge the gap with its marketing mandate.
- **Tourism Organizations:** Communities receptive to and supportive of tourism. Recent recognition of the need for Communities and organizations to work together. A need for the Region’s municipalities, suppliers and DMO’s to invest in tourism development and marketing which reflect shifts in the market place (in relation to product demands) and shifts in Valley tourism stakeholders and organizational structures.
- **Tourism Partnerships & Management:** Managing within administrative, economic and municipal boundaries represents the greatest challenge across the Region.

¹ The St. John River Society is currently seeking “Heritage River” designation for the St. John River, a process that can take 3-5 years, providing an additional reason to tour the area.

The Organization of Tourism

There are over 50 organizations involved in tourism development and/or promotion in the Upper SJRV. Although there are a significant number of organizations, there is very little of coordination between the various groups. Following is a summary of the tourism organizations active in the USJR as well as key issues associated with the organization of tourism.

- **Regional Tourism Associations (RTA's):** Edmundston-Madawaska Office du Tourisme (OTEM), SJRV Tourism Assoc. (Grand Falls-Mactaquac), Mactaquac Country.
- **DMO's** (Destination Marketing Organizations): OTEM, Fredericton Tourism.
- **Municipalities:** 11+
- **Museum Zones:** Madawaska, Victoria, Central Valley.
- **Others:** Greater Woodstock Tourism Partnership, Covered Bridge Tourism Initiative, Ad Hoc Committees as needed.
- **CEDAs/ADECs:** Madawaska, Grand Falls, Carleton, Central, Fredericton.
- **Little Integration of efforts, Clustering of Products** (Province, Region, Community)
- **Professional Management of Tourism:** recognized as a need (volunteers & paid staff)
- **Packaging:** Very little -- with Province or Other Partners.
- **Tourism Funding:** Little Partnered or Leveraged Funding Efforts Across Destinations.

Table 2: Key Upper SJRV Urban Hubs and Tourism Resource Mix

(More detailed information on communities provided in Appendix B)

Highlights by Region	EDMUNDSTON / MADAWASKA REGION	CENTRAL SJ RIVER VALLEY	FREDERICTON AREA
POPULATION	Madawaska County Total: 35,600 Edmundston & Area: 22,170 St. Leonard: 1,385	Grand Falls: 5,850 Bath: 590 Florenceville: 760 Woodstock: 5,200	Perth-Andover: 1,900 Bristol: 720 Hartland: 900
ESTIMATED VISITS	Foire Brayon: 70,000 Le Jardin: 30,500+	Grand Falls Gorge: 89,000 Hartland Bridge: 65,000 Grand Falls – bilingual	Historic Garrison: 30,000 Festivals: 40,000 Kings Landing: 40,000+ Capital City (bilingual)
CULTURAL MIX	Most francophone city east of Quebec; vibrant cultural mix. Francophone: Brayon, Acadie, USA / Quebec borders	New Denmark – Danish influence; Florenceville (multi-cultural) Aboriginal: Tobique First Nation (Pop: 805); Woodstock First Nation: 250. Nature's Wonder: Falls & Gorge	Aboriginal: Kingsclear First Nation: 100; St. Mary's First Nation (Pop: 695) Capital City – rich heritage
KEY TOURISM RESOURCES	Rich history, culture, music, food. NB Botanical Garden, Parc de la République Petit-Ternis, Foire Brayone, winter product	Agro-industrial region Potato Country extending to Florenceville & Hartland	Historic attractions Arts, culture, architecture, dining, entertainment....
TOURISM OFFICE	OTEM (Office du Tourisme) 2003	SJRVTA (Tourism Association)	Greater Fredericton Tourism Assoc.
RTA's, DMO's	Edmundston, Madawaska Considering St-Leonard	Grand Falls Econ. Development (new) Grand Falls Gorge Commission Greater Woodstock Tourism Partnership	Tourism Fredericton (DMO) Mactaquac Chamber of Commerce Kings Landing (staff)
KEY PARTNERSHIPS, MUNICIPAL SUPPORT	Strong support from City; Cultural & historical societies; Enterprise Madawaska	Hartland Covered Bridge Initiative (HCBI) Enterprise Grand Falls & Enterprise Carleton SJRVTA – 3 year partnership	Enterp. Central, Enterprise Fredericton Fredericton Tourism Annual Plan
TOURISM DEVELOPMENT	Strategic planning exercise (2000) Positioning exercise (2004)	Western Valley Tourism Plan (2001) Carleton Economic Development Plan (2003)	
STRATEGY / PLAN	Circuit patrimonial (2002) City Cultural Policy (2003-07)	Grand Falls Municipal Plan (2003) Hartland Tourism Plans (through HCBI)	

- The major communities addressed in the report include Urban Hubs of Edmundston, Grand Falls, Woodstock and Fredericton.
- Smaller communities along the St. John River are also considered, including Connors, Clair, Saint-Hilaire, Riviere-Verte, Ste-Anne-de-Madawaska, Saint-Leonard, Aroostook, Perth-Andover, Bath, Bristol, Florenceville, Hartland, Neckawic and Mactaquac, Keswick Ridge, and Douglas. Plaster Rock and New Denmark are noted for touring loop purposes.
- First Nations Communities: Madawaska, Tobique, Woodstock, Kingsclear, St. Mary's.
- In some cases, other communities are considered when they are connected to the River Valley, by virtue of proximity or clustering.

6. MARKET ANALYSIS

Several markets offer potential for the St. John River Valley. These markets are profiled and analyzed in detail in *Appendix F*, with summary findings presented in this section.

HIGHLIGHTS: Market Analysis

Target Markets

- In priority order, target markets for the SJRV are;
 1. Local markets,
 2. Regional, Ontario, Quebec and New England travelers interested in Touring with a Nature and/or Culture/Heritage bent,
 3. Travel Trade, including Motorcoach touring, FIT and travel learn markets, and
 4. Meeting, Convention and Events markets.
 5. Special Interest Markets, including the travel learn market.
- The SJRV and its offerings have low awareness in all markets.
- The Valley has the potential to package products for all identified visitor markets.

Positioning and Branding

- Research to test branding and positioning to take place during Summer 2004.

Comparative Destinations

- All profiled River Valley destinations have scenic, natural, historic, cultural and recreational resources, with strong natural attractions, presence of important waterways and use for recreational and outdoor activities, complemented by culture & heritage, historically significant attractions and parks, arts, festivals, trails and tours, all-season destination, promoted as a river/valley tourism product.
- None are promoted as a “majestic” or “grand” River Valley.
- Navigation, access to river, water-based activities is promoted on a small scale but not typically featured.
- Strong land-use planning, historical preservation, environmental protection programs (RiverKeepers, enhancement programs)

6.1 Origin Markets

Total tourism expenditures reached \$1.1 billion in 2003, with the number of visitors at 1.86 million. Key geographic markets are shown in *Table 3*. The geographic distribution of visitors is compared to other visitor origin information collected at select venues in the Valley. While different profiles may reveal a slightly different mix of visitors –the top four markets – the Atlantic Region, Ontario, Quebec and New England are consistent across all profiles.

The St. John River Valley captures an estimated 46% or 855,600 of the visitors to New Brunswick.

(CIMA Study, 2003).²

Because of the challenges of tourism marketing (e.g. relatively low awareness levels of New Brunswick and limited budgets), it makes sense for the St. John River Valley to build on the efforts and brand recognition built by the Province. To that end, matching the markets targeted by the Province and developing Provincial partnerships both pay off.

² Estimate based on The *CIMA Study*, Tourism and Parks, 2003, indicating that 46% of 1.86 million (= 855,600) overnight visitors travel via the St. John River Valley (see *Appendix C* for CIMA Profile).

**Table 3: SJRV Market Profile Summaries from Key Sources by Region of Origin
Percent of Total Arrivals**

Total NB Arrivals (2002): 1.86 Million Upper SJRV Estimated Capture: 46% = 855,600 visitors (CIMA, 2002)					
Market	NB Total (2003) ¹	River Valley Drive Profile (2001) ²	Kings Landing (Visitor Profile 2003) ³	Fredericton Irving VIC (2003) ⁴	Hartland (Visitor Survey 2003) ⁵
Region	31%	6%*	48%	26.2%	Not measured
Ontario	23	40	12	28.7	59%
Quebec	18	22	12	27.9	--
US (mostly NE)	24	20	16	10.9	14
Western Canada	3	10	--	4.2	8
Foreign	2	2	--	--	3
Other	--	--	10	--	16*

*Does not include New Brunswick Market
Sources:
¹ *New Brunswick Tourism Industry Performance 2003*, Department of Tourism and Parks, March 2004.
² *River Valley Drive Visitor Profile (2001)* (See **Appendix D**).
³ *Kings Landing Visitor Profile (2003)*, King Landing Historical Settlement, New Brunswick.
⁴ *2003 Visitor Statistics*, Fredericton Tourism, Fredericton, New Brunswick
⁵ *Hartland Visitor Survey 2003*, Covered Bridge Initiative, Hartland, New Brunswick.

6.2 Market Trends and Opportunities

Tourism is one of the fastest growing industries in the world and New Brunswick has experienced strong growth over the past 10 years, yet it is affected by many variables. The decline in the US economy, SARS, the war with Iraq and negative US relations have all meant stagnant or decreasing levels of visitation as people tend to vacation where they know it will be safe. The nature of the business of tourism makes the need for targeted marketing efforts critical. Monitoring market trends is important as they often provide clues to positioning products tailored to specific market needs.

Loud and clear from all market segments is the need to provide markets with:

- Experiential, hands on learning activities.
- Experiences that are authentic and unspoiled.
- Hands on demonstrations, insights into operations (backstage) and nature.

For 2004, one obvious "threat" is the possible return of the Regional market (NB, NS, PEI) to the U.S. As the Canadian dollar rises, Canadians tend to head south which may affect the Ontario and Quebec markets as well. Research conducted in 2001 showed the Regional market was the most price sensitive (followed by Quebec) and regional market performance was being significantly propped up by the exchange situation.

For the Upper SJRV, the advent of the new highway and bypassing of several communities en route means achieving recognition for unique summer and fall product experiences as well as events and attractions. Key travel market trends and their relevance for the Upper SJRV are shown in **Table 4**.

Table 4: Travel Trends & Their Relevance to the Upper SJRV
 (Note: Additional Trends and their Relevance to the Valley are Noted in Appendix F)

TRENDS	RELEVANCE TO UPPER SJRV
<p><u>Draws/Attractors</u></p> <ul style="list-style-type: none"> • Experiential trend: fun things to see, do & learn. • Historical and cultural sites and attractions continue to be favored. Authentic experiences • Natural Attractions: Strong interest in places with nature-based attractions. • Geotourism: tourism that sustains/enhances the geographical character of the place visited – its environment, culture, aesthetics, heritage and the well-being of its residents. 	<ul style="list-style-type: none"> ➤ Development of unique, “hands-on” interpreted, activities with local flavour, intimacy, immersion,. ➤ Connect and cluster the unique and market-ready Cultural attractions in the Valley (eco-museum) ➤ Small scale, heritage character of St. John River Front communities. ➤ Highlight natural features & strengths in promotions And highlight natural-based experiences. ➤ Authenticity is important – willing to pay more to support protection and. Preservation of culture/ heritage. ➤ Self-guided itinerary development required.
<p><u>Travel Patterns</u></p> <ul style="list-style-type: none"> • Continuing to favour regional travel. • Weekend travel & shorter trips favoured • Road travel is continuing to grow, including modes of personal auto, Motorcoach and RV. 	<ul style="list-style-type: none"> ➤ Good news for nearby US States travel but may but may be offset by increased Maritime Regional travel to US. ➤ Nearby markets, within a 5-6 hour drive ➤ Need to create opportunities for Intercept
<p><u>Information Sources</u></p> <ul style="list-style-type: none"> • Travel Information: variety of sources used: friends & friends and relatives are the #1 source (43%); travel agents (39%), travel companies (32%). One in five travelers (21%) contacted a city, state or country’s tourism office. • Internet: Increased use of Internet to look and book. (55% for Canada – CTRI; 66% in the US, TIA) • Online leisure travel planners: Most popular elements of online trip planning: <ul style="list-style-type: none"> - searching for maps/driving directions (60%) - searching for lodging (53%), - searching for things to do at the destination (45%). 	<ul style="list-style-type: none"> ➤ Need to inform locals of what there is to see and do to see and do; development of local Ambassador Programs can serve to inform locals. ➤ Websites required for all travel destinations and operators located in the Valley are a must. Need for links & transactional sites for booking. ➤ Market search requirements need to be considered in website design.

Continued...

Sources: Canadian Tourism Commission, 2004, Canadian Travel Research Institute (CTRI), 2004; New Brunswick Department of Tourism and Parks, 2004; *TIA Domestic Travel Report, 2003*, Travel Industry Association of America – Travel Statistics and Trends; *E-Travel Consumers: How They Plan and Book Leisure Travel On-line*, 2003, the *Geotourism Study*, 2003

Table 4 (Continued...)

Travel Activities Trends	RELEVANCE TO SJRV
<ul style="list-style-type: none"> • Special interest holidays growing – conventional sight-seeing, visiting and other passive experiences declining. 	<ul style="list-style-type: none"> ➤ Identifying niche markets and matching these with experiences offered will be key for the Valley.
<ul style="list-style-type: none"> • Camping - #1 outdoor vacation activity in America. Vacationers are married with children at home; average age 37; also enjoy hiking, biking canoeing, kayaking. 	<ul style="list-style-type: none"> ➤ Critical mass of strong camping areas in the Valley.
<ul style="list-style-type: none"> • Cultural Events/Festivals: 75% attend cultural activity or event while on a trip. Performing arts, visual arts visiting art museums or antique establishments high. 	<ul style="list-style-type: none"> ➤ Opportunity to showcase Festivals in the Valley & produce cohesive calendar of events for the entire Valley. Opportunity or visual arts studio maps
<ul style="list-style-type: none"> • Historical Places/Museums: 58% of Canadians include historic activity on trips; 41% had visited a designated historic site. 	<ul style="list-style-type: none"> ➤ The strong presence of heritage sites and museums and current efforts to link these through the Museum network should begin to pay off in 2004+; circuit patrimonial –Madawaska; International Cultural Heritage Route (Maine-NB)
<ul style="list-style-type: none"> • Heritage Tourism Enthusiasts: mostly affluent; university educated (35%) and adult couples (55%). 	<ul style="list-style-type: none"> ➤ Interest in museums, art galleries, crafts, Outdoor activities (cross promotion).
<ul style="list-style-type: none"> • Educational Travel: 20% have taken an educational trip to learn or improve a skill, sport , hobby; 18% saying this was the main purpose of trip. 	<ul style="list-style-type: none"> ➤ Development of niche travel learn markets for specific experiences in designated areas of the Valley.
<ul style="list-style-type: none"> • Fitness While Traveling: 25% try to use a Fitness centre or gym while traveling 	<ul style="list-style-type: none"> ➤ Opportunity for accommodation provides to work with local gyms & running, hiking trails – cross-promotion.
<ul style="list-style-type: none"> • Sports and Travel: Almost 40% attended an organized sports event, competition or tournament as either a spectator or participant.... In last five years. 	<ul style="list-style-type: none"> ➤ Planned Edmundston Athletic Centre (2006) means more opportunities for sporting events; opportunities to work with local sports organizations, bike-a-thons, marathons, canoe/kayak races
<ul style="list-style-type: none"> • Biking vacation rank as the 3rd most popular outdoor vacation activity in US; 10th in Canada. affluent; about half between 18-34; 80%+ take camping trip or hiking trips. 	<ul style="list-style-type: none"> ➤ With over 400 kms of trails, including the NB trail, the Valley has the opportunity to host a major cycling event to showcase the Valley and increase awareness.
<ul style="list-style-type: none"> • Wildlife Viewing/Birdwatching: is on the increase. 	<ul style="list-style-type: none"> ➤ Develop species lists for distribution to travelers.
<ul style="list-style-type: none"> • Golf & Tennis: 12% play golf; Not always the primary activity (55%) but high degree of travel & 1 golf trip per year. 	<ul style="list-style-type: none"> ➤ With 12 courses of varying levels in the Region, grouping these offers a critical mass thus opportunities to lengthen stay.
<ul style="list-style-type: none"> • Garden Tours: popular with US travelers; about 20% of travelers went on a garden tour, visited a botanical garden attended a gardening show/festival. 	<ul style="list-style-type: none"> ➤ Le Jardin is under-visited; 2005-06 Fredericton Botanical garden expansion (\$3 million) – means the 3 Provincial gardens can be packaged and promoted.
<ul style="list-style-type: none"> • Cuisine/Culinary Tourism: interest in sampling new and different "local" cuisine; wine pairing. 	<ul style="list-style-type: none"> ➤ Potential tie-in with NBCC-Edmundston and Valley restaurants and chefs.
<ul style="list-style-type: none"> • Aboriginal Tourism: is on the increase. 	<ul style="list-style-type: none"> ➤ Draw connections among five First Nations sites with opportunities to learn about Maliseet and MicMac.
<ul style="list-style-type: none"> • Religious Services: often an important part of a travel experience. About 20% of New England residents went to a place of worship while traveling. 	<ul style="list-style-type: none"> ➤ Opportunity to showcase some of the churches, stained glass windows & Religions of the Upper SJRV as well as related Museums.

Sources: Canadian Tourism Commission (2004), Department of New Brunswick Tourism and Parks (2004); TIA Domestic Travel Report, 2003, Travel Industry Association of America – Travel Statistics and Trends. *The Historic/Cultural Traveler*, 2003, TIA.; *Travelers Who Attend Sport Events*, 2003, TIA, *Adventure Travelers*, TIA).

6.3 Key Markets

6.3.1 Market Snapshot: Visitors to New Brunswick and the St. John River Valley

Geographic markets of the *Ontario, Quebec, the Maritime Region and New England*, represent key visitor markets for the Upper SJRV. The primary FIT (fully independent traveler) focus is on Ontario and Quebec. A profile of visitors to New Brunswick and their trips are shown in *Table 5*.

Table 5: Profile of Primary Geographic Markets to New Brunswick*

	Maritime Region (NB, NS, PEI)	Ontario	Quebec	New England
The Visitor				
• Age	Youngest visitors	Younger than US	2nd youngest visitors	Oldest visitors (60% over 55)
• Income	50%: \$51,000+	High Income	62%: \$50,000+	Highest income
• Education	25% Post Secondary	Well educated	41% University	Highest; 24% Post Grad
• Degree of Trip Involvement	Low risk, involved; Affected by cost.	Low risk, modest involvement	Low Risk; open to new concepts; most spontaneous	Low risk, modest involvement
• Key Interests	Outdoors, Nature, Exploring	Whale watching	Most environmentally sensitive; Acadian culture Beaches	Touring, Nature, Exploring
The Trip				
• Time of Year	60% in August	August & Fall	July (52%) & Aug.	Strong Aug to Oct.
• Length of Trip	60% stay <3 nights	Above avg in 10-15 nights	Less than 10 days longer than avg.	Long trips – 32% more than 15 nights.
• Party Composition	75% w/ children	Without children	Often without children	Without children
• First-Time vs. Repeat	82% Repeat	Lowest ratio of First Time	Half: First time	Majority first time
• Itinerary type	Somewhat flexible or very open	Open, Flexible	Somewhat flexible or very open	Somewhat flexible
• Advance Planning	Spur of moment	Later planners	Late planners	Earliest Planners
• Reservation type	--	Lowest rate of Reservations	21% pre-booked all nights	Above avg. advance reservations
• Information	57% no advance Info.	Obtain advance Info.	Obtain advance Info.	Obtain advance info.

*Note: Additional International FIT Markets to New Brunswick include: the UK, Germany and France.

Source: *Marketing & Sales Plan 2003*, Department of Tourism & Parks.

While **families** are still a strong component, representing 34% of the market, **couples** are a growing market of “empty-nesters” as children of baby-boomers” leave home. There is a range of adult visitors, but they tend to be older and more sophisticated, with lots of travel experience.

Given the River Valley’s prominence as a destination route through New Brunswick, the importance of tying in with Provincial marketing programs cannot be overstated for three reasons:

1. These are the key markets at which the province aims,

6. Market Analysis

2. The River Valley fits within Natural Wonder/Natural Attraction which is a key message to US and Ontario markets. These geographical markets also represent the touring market, with a nature skew.
3. the historic and significance of the River offers the potential to target additional markets (St. John River Society currently seeking designation as a National Historic River).

Average expenditures and trip lengths by visitors to the Valley are shown in **Table 6**. Approximate visitation to key locations in the Valley is shown in **Table 7**. While a high number of visitors travel through the Valley and stop overnight, it is evident that **Valley communities are not capturing these visitors at key attractions**.

Table 6: Average Expenditures & Trip Length: SJRV Visitors

Expenditures & Nights	2003¹	2001²
# of nights	6.12 nights	5.14 nights
Trip Expenditures	\$947	\$908
Per Day Expenditures	\$155	\$187

Sources: ¹ 2003 *Customer Satisfaction Study*, Tourism and Parks
² 2001 *River Valley Drive Profile*, Tourism and Parks.

Table 7: Upper SJRV Visitation: Snapshots for Key Geographic Locations

St. John River Valley	2003 Visits (est).
Overnight Visits (total) travel through the Valley & Stay overnight	855,600 (est)
What We Know:	
Edmundston area	
La Foire Brayonne	70,000
Le Jardin : Attraction	30,575
Provincial Park Campground	6,155
Grand Falls area	
The Gorge	89,000
Perth Andover	
VIC	10,000
Woodstock Area	
Hartland Covered Bridge	65,000
VIC	5,000
Carleton County Courthouse	4,000
Fredericton Area	
Mactaquac Provincial Park Campground	17,000
Historic Garrison	30,000
Kings Landing	40,000
Other Fredericton Visits (events/festivals)	40,000

Note: Actual Visitation to Each Urban Hub unknown

Sources: Office de Tourisme, Edmundston; Grand Falls Gorge Commission, Grand Falls; Village of Perth Andover; Covered Bridge Initiative, Hartland; Town of Woodstock; Tourism Fredericton.

6.4 Priority Target Markets for the Upper SJRV – A Summary

Priority target markets for the Upper SJRV are identified below. Each market is discussed in more detail in Appendix F.

In priority order they are;

A. PRIMARY MARKETS: 1. Locals, 2. Quebec and Ontario Touring markets;

B. SECONDARY MARKETS: 1. Regional Market (Maritimes), 2. New England Market, 3. Snowmobile market, and

C. DEVELOPMENTAL MARKETS:

1. Meetings, Conventions, Sporting Events; and
2. Special Interest/Niche Markets.

Note: Market development should be approached cautiously and systematically, growing as products and packaging are developed and strengthened

In targeting these markets, it is critical that Valley marketers work with TAP since target markets are similar to those targeted by TAP.

A. PRIMARY MARKETS

1. **Local Markets (New Brunswick and Adjacent Maine):** Nearby markets have strong potential since most products have local appeal, product awareness is generally high and these markets offer opportunities for word of mouth advertising. Local markets can act both as consumers and as ambassadors to promote and recommend Valley experiences to visitors. Attractions and experiences need to recognize the need to cater to locals, thus taking advantage opportunities for word of mouth promotion.
2. **Quebec & Ontario Touring Markets:** traveling to NB and/or en route to a Maritime tour. The market includes both general consumers and travel trade markets. This Valley visitor is described in detail in the 2001 *River Valley Scenic Drive Consumer Profile*,³ a summary of which is provided in **Appendix D**.

a) **Consumers:** This is the largest market and includes couples and families interested in touring with a Nature and/or Culture/Heritage bent. They seek Natural attractions, scenic beauty, Parks, autumn colours and walking, hiking and biking. This market is also interested in the culture/heritage opportunities, including festivals and events, local crafts and antiques, covered bridges. Good value for the dollar key.

b) **Travel Trade** (Appendix F-3): includes those offering Motorcoach, FIT and Travel Learn Products. New England, Ontario and Quebec are key markets, with growth from mid-Atlantic states.

i) **Motorcoach:** room sales decreased by 14.2% in 2003, reaching a total of 38,241 rooms sold. SJRV has resisted the pattern of market deep decreases in other New Brunswick cities, Fredericton is still the #2 City in the Province for motorcoaches (after Saint John). Moreover, the Upper SJRV is capturing more Provincial market share, with a 3.2% increase in 2003 over 2002.

³ NB Tourism and Parks, 2001 *River Valley Scenic Drive Consumer Profile*, Fredericton: New Brunswick Department of Tourism and Parks, 2002.

- ii) **FIT:** similar interests to consumers noted above (#2a).
- iii) **Travel Learn (Special Interest/Niche Market):** growing market; not as large as other travel trade markets but trends are shifting toward “travel learn experience” for FIT travelers and consumer markets. Consequently, as products are built to serve the travel learn markets, experience-based products are also created for the touring consumer market.

B. SECONDARY MARKETS

1. Regional Market (Maritimes):

- New Brunswick is considered the primary consumer market -- this includes predominantly cities with a high proportion of English speaking working adults. Major cities in New Brunswick offer opportunities for marketing the Valley and creating awareness about evolving offerings. In New Brunswick alone, there are over 300,000 working adults.
- **Regional visitors** tend to be younger with families, are repeat visitors and take shorter getaway trips with reservations made in advance. These travelers desire quality of service, security and familiarity. They tend to stay in hotels/motels but are open to new experiences.

2. New England Market: Includes general consumer and trade markets.

In addition to Maine, other States in New England represent potential targets since there is already a (limited) awareness level of New Brunswick, particularly in larger New England cities. New England states have a total market size of 19 million and consist of Maine, Massachusetts, New Hampshire, Maryland, Delaware, Connecticut and Vermont.

3. Snowmobile Market (Special Interest): for relevant, market-ready products.

The snowmobile market is one already targeted by the Province – the Northern Odyssey already has a strong presence. This market can be reached by traditional promotional methods as well as directly marketing to clubs. Many snowmobilers are members of clubs who maintain their own trails and can be reached by marketing to these clubs.

C. DEVELOPMENTAL MARKETS

1. **Small Meetings & Conventions:** Businesses and Associations can be targeted for small-medium sized meetings and conventions. While Fredericton and Edmundston already target these markets to a degree, Grand Falls and Woodstock do not. The primary corporate market consists of Regional business owners/ managers residing no more than a 5-6 hour drive from Valley Urban hubs (the Region, Quebec and Maine) for positioning as an optional Fall, Spring, Winter Business/Meeting Retreat option. In the total market area, there are approximately 16,600 businesses that belong to Chambers of Commerce or Boards of Trade. Sporting events markets also offer potential and are already being targeted to some degree and include tournaments, competitions and other sporting events in all categories.
2. **Special Interest/Niche Markets:** in which the Region has a significant competitive advantage, and tourism operators/stakeholders are prepared to invest. These are nearby, relatively small and easily reachable Markets include: 1. Cyclists, 2. Walkers/Hikers, 3. Travel Learn groups, 4. Golfers, 5. Sport Fishing/Anglers, 6. Cross-Country Skiers; 7. Naturalists, 8. Art Enthusiasts. A brief evaluation of these markets is presented in **Table 8**.

While these markets are reachable, it must be noted that substantial resources are required to target these markets.

Table 8: Priority SPECIAL INTEREST/NICHE Markets: Assessing Potential

Assessment Criteria	Importance/ Weight	Cyclists		Walkers/ Hikers		Travel Learn		Golfers		Sport Fishing		XX-Skiers		Naturalists		Art Lovers	
		Pts ²	Score ³	Pts	Score	Pts	Score	Pts	Score	Pts	Score	Pts	Score	Pts	Score	Pts	Score
Match with Valley Products/ Services	5	4	20	5	25	3	15	4	20	2	10	3	15	3	15	3	15
Potential Yield (\$\$)	5	2	10	1	5	4	20	4	20	4	20	2	10	2	10	4	20
Market Size (Substantial enough to be Profitable)	4	3	12	5	20	2	8	4	16	1	4	3	12	2	8	2	8
Homogeneous (similar Characteristics within Segment)	4	4	16	1	4	4	16	3	12	1	4	2	8	3	12	2	8
Operational (easy to Access through Promotions)	3	3	9	2	6	2	6	3	9	2	6	2	6	3	9	2	6
Geographic Proximity	3	3	9	3	9	3	9	3	9	2	6	3	9	3	9	3	9
Competitive Strength (Unique Selling Proposition)	3	4	12	3	9	2	6	1	3	1	3	2	6	2	6	2	6
Potential Contribution to Off- Season Demand	3	3	9	3	9	4	12	3	9	4	12	5	15	3	9	3	9
TOTAL SCORE⁴ <i>(Highest Possible Score = 150)</i>			97		87		92		98		65		81		78		81
PRIORITY MARKET RANKING			2		4		3		1		7		5		6		5

CALCULATING THE SCORES:
 1 Column 1: Weighting is 1-5, where 5 is most important.
 2 Column 2: Points given for this evaluation criteria in this market category from 1-5, where 5 is high.
 3 Score = Importance/Weight multiplied by points.
 4 Total all the points, then compare total scores for each market to help identify priorities.

6.5 Marketing Strategy

6.5.1 Strategic Marketing Goals

The strategic marketing goals are presented below along with the highlights major elements of the marketing strategy. Details are presented in the Recommendations sections of the report.

Overall, the marketing strategy is intended to achieve the following visitation and revenue goals.

1. **Increase VISITS from key markets by 1% per year, over the next three years. Yearly objectives are to increase overnight arrivals to 439,939 in 2007 (shown below).**

	Overnight Arrivals Staying in Paid Accommodation	
Base Year:	• 2003	427,000
Projections:	• 2005:	431,270
	• 2006:	435,583
	• 2007:	439,939

(2003 Base Year: Assumes 855,600 SJRV visits in 2003⁴; (46% of 1.86 Million Visitors to NB). Assume 50% stay overnight in paid accommodation = 427,800 in 2003).

2. **Increase REVENUES from key markets by 1% per year over the next three years to \$164.8 million by 2007. Yearly objectives are to increase revenues to \$82.4 million in 2007 (shown below):**

Base Year:	• 2003	\$ 80.0 million
Projections:	• 2005:	\$ 80.8 million
	• 2006:	\$ 81.6 million
	• 2007:	\$ 82.4 million

(2003 Base Year: Assumes \$80 million in tourism expenditures in the Upper SJRV in 2003, assuming average overnight visitor spends \$187/day⁵).

3. **Increase MARKET AWARENESS** of the Valley and its experiential offerings. Special event (Cycling) in 2006 featuring the entire Valley, featuring the NB Trail and using this as a uniting force.

⁴ See Section 6.1; Estimate based on The *CIMA Study*, Tourism and Parks, 2003 indicating that 46% of 1.86 million (= 855,600) overnight visitors traveled via the St. John River Valley in 2003)

⁵ Estimate based on the River Valley Profiles (2001) indicating that the average overnight visitor to the River Valley spends \$187 per day.

6.5.2 Strategic Marketing Approach

The strategic marketing approach for reaching the target markets described above is presented in the Recommendation section of this report. An integral part of the strategy is the Intercept Approach. As such a word on the Intercept Approach is warranted.

A Note on the Intercept Approach: Why Intercept?

Since thousands of visitors travel through the Valley, a multi-pronged marketing approach is necessary, with a focus on intercepting Visitors both before and as they drive through the Valley is key to growth in the region. The idea is to Intercept them before arrival or while en-route and direct them to communities on the River Valley Drive using "River Greens" and key area features as reasons to stop.

As part of an overall market strategy, the Intercept approach is justified for several reasons:

1. A majority of travelers (66%) do not make advance reservations (River Valley Scenic Drive Profile, 2001). In addition, 26% indicate they are very open and have not pre-planned and 39% say they are somewhat flexible (Consumer Interests, Motivators and Attitudes Study, 2003) - suggesting opportunities for Intercept.
2. Valley tourism stakeholders in all workshops noted this as one of the top issues along with ways to "capture" travelers en route through the Valley.
3. Intercept is a less expensive approach than reaching the source markets "in market". There is substantial evidence that the closer the prospect is to the destination, the easier the sell.
4. Intercept allows for "personal selling" on site - visitors are at our location and can be introduced to Valley "hospitality" thus encouraging them to stay.
5. With development of the new Trans Canada highway, most travelers will be driving by faster and quicker and need to be encouraged to "take time to smell the roses."
6. New highway development typically brings with it a significant bypass of towns, villages and tourism stopping points.
7. The SJRV has suffered from a lower profile than coastal drives such as the Acadian Drive and Fundy Drive. In part, a lack of clustering and market-ready products has contributed to this low profile. Since the Edmundston is a gateway to Atlantic Canada, New Brunswick and the River Valley Drive, this point needs to be reinforced.
8. The SJRV does not have strong destination appeal, no particular community has significant draw or serves as a strong catalyst for the area. Consequently, the Intercept needs to focus on "gems" in the area that tie into market profiles and trends.

6.6 Positioning and Branding

The findings outlined in the marketing and product development sections clearly identify the Upper St. John River Valley as having several markets and a diversity of products. This section outlines the Positioning and Branding Goals and Objectives and examines Valley strengths from a positioning perspective. Current messaging used and positioning used by competing River destinations are also noted. Finally the themes and tag lines are presented, along with a rationale.

6.6.1 Positioning Goals and Objectives

Overall Goals

Developing a position for the Upper SJRV is a process of supplying a formal branding solution to a destination that has not benefited from one before – rather than a process of “re-branding” a destination that has underachieved.

The overall goals of the positioning statement (and key communication challenge) are development of a Positioning Statement and Brand that:

1. Encompass: a) the size, b) character, c) flavour, and d) diversity of the St. John River Valley, and
2. Differentiate the St. John River Valley from other River Valley and Maritime destinations.

Positioning Objectives

The objectives of the recommended positioning statement, theme and call to action are to:

1. Unify the Valley and present it as a cohesive, exciting unique destination – so that travelers will be interested in stopping and taking a look.
2. Distinguish the Valley and highlight a unique feature or element that makes the Valley worth a stop.
3. Simplify what the Valley represents, in order to encompass the most meaningful elements/experiences of the Upper St. John River Valley.
4. Facilitate Operator, Regional and Provincial “buy-in” to a unifying theme by differentiating the Upper St. John River Valley from competitive destinations.
5. Have the potential to be used in all future St. John River Community messaging and promotion material in order to present a consistent image/presence.

6.6.2 Current Valley Messaging

The current Provincial positioning of *Rivers and Inland Waterways* and for the St. John River, specifically, are clearly focused on repositioning New Brunswick's rivers vis-à-vis other Atlantic Canada River destinations. These messages that have previously been used or are in use now in Provincial promotions are presented in **Table 9**. It is clear that there is no consistent positioning of the Valley when one examines the positioning of each of the communities in the Upper Valley (**Table 10**).

The Challenge:

To present the Upper St. John River Valley as a bigger, better more beautiful touring destination.
And

Create the perception that this a **one of a kind river destination** which features, one-of-a-kind characteristics and experiences.

Table 9: Current St. John River Valley Provincial Messaging

- "Tour Miles of the Maritimes' Most Attractive Rivers."
- "Bend, Twist and sail the Maritimes' Most Spectacular Rivers."
- "Tour Our Majestic Rivers ... Some of the Longest in the Maritimes."
- "Rivers and Waterways that Stretch from Breathtaking to Beautiful."
- "... the Most Picturesque River Experience in Atlantic Canada."

Table 10: General Positioning of Communities

Positioning & Promotional themes	EDMUNDSTON AREA	GRAND FALLS AREA	WOODSTOCK	OTHER CENTRAL	FREDERICTON AREA
Communities	<p>Edmundston: (Currently re-focusing) "La légendaire République du Madawaska" / "The Legendary Republic of the Madawaska"</p> <p>Upper Madawaska – <i>Circuit patrimonial</i></p> <p>St-Léonard: "carrefour de la vallée" (on village sign)</p>	<p>Grand Falls: Hometown profile; <i>Experience the "Legendary Grand Falls Gorge"</i></p> <p>Perth-Andover: Hometown Profile' <i>"Where People and Trails Meet"</i></p> <p>New Denmark – <i>"Culture & Traditions"</i></p> <p>Plaster Rock <i>"Gateway to Mount Carleton"</i></p>	<p>Woodstock – <i>"NB's first Town"; "Hospitality Town"</i></p>	<p>Hartland – <i>"Home of the World's Longest Covered Bridge"</i></p> <p>Florenceville – "French Fry Capital of the World"</p>	<p>Fredericton: <i>"Atlantic Canada's Waterfront Capital"</i></p> <p><i>"New Brunswick's Capital City"</i></p> <p>Mactaquac Country: Map & campaign: <i>"Something to do everyday!"</i></p> <p>Nackawic: City services in a country setting</p>

Sources: web sites, literature, tourism guides

6.6.3 Comparative Destination Positioning

Many high profile River Valleys in North America have ambitious web sites and material that point to their unique qualities as an eco - or heritage destination. As with the St. John River, many River Valley tourism destination areas are not limited to political boundaries, crossing provincial and/or state lines, and in some cases, international boundaries (Canada-USA).

The more successful River Valley destination areas have very strong scenic, natural, historic, cultural and recreational resources (see **Table 11**). The presence of important waterways is not only historically significant but are also accessible to some form of water-based activity. Although the building of dams has had significant impact on the various river systems, the vast majority have long sections of navigable waters, canoeing or white water rafting. Target markets are most often adults as primary (outdoor enthusiasts) and families as secondary.

Common Strengths

- Strong tourism organizations and marketing programs with many public/private partnerships (often part of provincial or state initiatives)
- Recognized sites and parks of historical and cultural significance (American Heritage Rivers, National, State and Provincial Parks, UNESCO Sites, Heritage Corridors)
- Well developed base of accommodation, food and traveler services.
- Many have a mix of urban and rural features. (Also near major urban markets)
- Highly developed outdoor adventure products and recreational activities (hiking, biking, canoeing, whitewater rafting, camping, snowmobiling, skiing, golf, fishing & hunting)
- Well developed itineraries, trail and touring networks (including some kind of River Tour), and nostalgic form of transpiration (rail tours, steamboat excursions, stagecoach trips)
- Often cater to 4-seasons or have strong Summer, Fall and Winter products.
- Some agricultural base with regional crops or specialty food tours (farmers' markets, wine & champagne, flavor trail, country fairs)
- A mix of art, crafts, different cultures, festivals, and entertainment.
- Strong commitment to heritage preservation and environmental protection (RiverKeepers, estuary and river enhancement programs, land-use planning)

Some Weaknesses

- Not all disciplined marketing programs with themes and calls-to-action that tie together the special nature of the River destination communities, features and experiences.
- Often missing a strong international component to link the tourism products through the River of the neighboring territories. (ex; Red River of the North)
- Some river areas are so broad that they are difficult to search as a single tourism destination area. (ex; Mississippi River)
- All don't necessarily have well developed river themes. (The American Heritage Rivers are better developed)

There is potential for the St. John River Valley in New Brunswick to build stronger partnerships with the St. John Valley area (Northern Maine), Aroostook County and other areas near the Maine border. There are many common themes, such as the Appalachian Trail, Acadian Culture, potato festivals, bike tours, snowmobiling, historical events.

Table 11: Comparative Destinations

Dimension	St. John River Valley	Saint John Valley	St. Lawrence River Valley	Ottawa River Valley	Mississippi River Valley	Hudson River Valley	Blackstone River Valley
Location	Western NB	Aroostook County, Eastern Maine	Southern Quebec	Eastern Ontario	State of Minnesota to Mexico	New York State	Massachusetts & Rhode Island
Length	673 kms (414 miles) long; 55,000 ms ² Watershed Basin size.	not mentioned	3,058 kms (1,900 miles) long; Major Waterway covering 60,000 square km. area.	1,130 kms (678 miles) long; largest tributary of St. Lawrence	3,779 kms (2,348 miles) long; Over 250 tributaries; Watershed = 1,247 square miles (one third of nation's land mass)	504 kms (315 Miles) long; 19 counties; 8 million people	256 kms (160 miles) long; Watershed = 456 sq. miles; River Corridor approx. ; 24 communities; serves 1/2 million people
Description	Part of River Valley Scenic Drive network in NB; 2 major tributaries (Aroostook, Tobique); Urban and rural mix	Part of Aroostook County; over 2,000 lakes, streams rivers; Wilderness	3 Major Regions: 1. Quebec (<i>Emblem of the St. Lawrence</i>); 2. Charlevoix (<i>Between See and Mountains</i>); 3. Appalachia (<i>On the Trail of Navigators</i>)	Half wilderness; major area: Renfrew County; 7,600 sq kms; 900 lakes; 4 major River Systems	6 Major Tourism areas: 1. The Hills, 2. The Delta, 3. The Pines, 4. The Capital/River Region, 5. The Coastal.	Tidal Estuary of national importance (154 miles)	Part of National Heritage Corridor; Promoted by National Park Service
Branding Theme	"The Most Picturesque River Experience in Atlantic Canada" part of Rivers & Inland Waterways -- River Valley Scenic Drive	"Discover Inland Maine"	The St. Lawrence - Gateway to the Americas (<i>Majestic Waters of the New World</i>)	"Roots and Rivers"; Eastern Ontario. <i>Naturally Wonderful</i> (Eastern Gateway to Algonquin Park); 2004 tag line: Ontario's Adventure Playground.	Mississippi - Feels Like Coming Home! The Great River / America's Great River Road /	Historic Hudson Valley; <i>Multireakantuck -- river that flows two ways</i>	No brand or theme noted
Marketing - Selling Feature	Touring; with products and experiences	Wilderness; Focus is on County, not River	All season; something for everyone	Strong marketing - broad demographics and families	Size - well documented; river area books, guides etc.	History, culture	Touring -- land and water;
Product Focus	Cities Nearby, Hometowns, Must See Attractions, Festivals and Events.	Potatoes as large agricultural crop; diverse cultures (MicMac, Maliseet, French Acadia, English)	Parks & natural sites; cruises & excursions; outdoor activities, cultural attractions, entertainment agri-tourism, arts & handicrafts, spas. Charlevoix area = World Biosphere Reserve	Highly developed outdoor & recreation product base (all season); outfitters, whitewater adventure, golf courses; hiking, biking, driving trails; winter activities; cultural/ heritage attractions, museums, theme parks, farmers markets, special events.	Heritage, Natural History, Recreation, Riverboats, Cycling Events; Annual Grand Excursion the Upper Mississippi River (reenactment of 1854 steamboat flotilla);	Lighthouses, estates of the Hudson, Valley history; tours, festivals/events; culture/heritage, arts/crafts; state Parks, Greenway Trail system.	Historic sites, river tours, land tours (rail, trolley, motorcoach, walking, fall foliage); Canals; Parks, sports recreation, bikeway, Vineyards, farms orchards; historic mill villages.
							Continued...

6. Market Analysis

Table 11 (cont'd.)	Comparative Destinations						
Dimension	St. John River Valley	Saint John Valley	St. Lawrence River Valley	Ottawa River Valley	Mississippi River Valley	Hudson River Valley	Blackstone River Valley
Special Focus/ Marketing Material Focus	The Must See's and Do's of the River Valley Scenic Drive.	Touring Trail Themes: 1. Maine Art Museum Trail; 2. Maine Architectural Trail (6 driving tours through small towns). Only focus on Valley is 69 mile bike tour ("Tour de la Vallée: Madawaska, Long Lake, Fort Kent loop))	Three discovery itineraries: 1. Subtle Savors of the St. Lawrence ; 2. "Ebb & Flow (ecotourism/nature); 3. Tides of Time (culture heritage); Seven thematic touring routes: 1. Flavour; 2. Arts/Crafts; 3. Gest Landscapes & Vistas; 4. Painters; 5. Culture/Heritage; 6. Maritime Heritage; 7. Religious Heritage.	"Explore the Roots & Rivers Guide" (self-guided driving tours); "Rural Ramble" (traditional Self-Guided family tours); "ValleyExplore.com" = walk, hike, drive, XC ski, waterfalls and canoe trails); "Terniskawa Waterway": boating, adventure, pioneer, voyager, trader (roots)	Illinois River Valley Heritage (several programs; 11 designated heritage tourism areas)	Hudson River Valley Scenic Byways Project Tidal Estuary Integrated, single River Valley Region Historic River Towns of Westchester County	Tidal estuary of national importance (154 miles); Group tours & Elderhostel programs (several river themes); many river access points
Tourism Interests	DMOs in Edmundston, Fredericton; SJRV Tourism Assoc.; Grand Falls Gorge Commission; Greater Woodstock Tourism Partnership; Covered Bridge Initiative	Maine Acadian Culture Project (NPS; www.potatoblossom.org; www.greaternoulin.com	3 Regional tourism associations		Mississippi Tourism Industry Partners; cooperative effort across several states to coordinate aies & marketing, media, research etc.		Blackstone River Valley National Heritage Corridor Commission; Blackstone Valley Tourism Council (funded by revenues from hotel room tax)

Note: Additional destinations profiled in Appendix G are : Montmorency, Quebec; Kennebec & Moose River Valleys, Maine; Connecticut River Valley & Shoreline, Red River Valley, Manitoba, North Dakota.

6.6.4 SJRV Strengths & Weaknesses Related to Positioning & Branding

1. The key strengths of the Upper St. John River Valley have been identified as historically important, culturally unique, physically beautiful, authentic and interactive (Table 11).
2. The current list of weaknesses includes inconsistency and lack of product offerings, lack of activities and salient qualities in some of the communities and limited access to River experiences along the River Valley (see **Table 12**).
3. In identifying the most appealing qualities of the Upper St. John River Valley to target markets, Table 22 provides a brief analysis of destinations that share some similarities with the St. John River Valley.
4. To understand the competition, we will divide them between competing intra-regional destinations and select competing river destinations in Canada, and a competitive U.S. River.

**Table 12: St. John River Valley Strengths & Weaknesses:
Positioning Perspective**

Features	Strengths	Weaknesses
<ul style="list-style-type: none"> • Largest watershed to Atlantic Seaboard. • Three cultural identities: French, English, Maliseet. • Industries: Agriculture, Forestry, Hydro Electric dams • 11 Major Communities: mix of cultures, rural, urban living 	<ul style="list-style-type: none"> • Readily identifiable “River Valley Scenic Drive” logo used on highway signage and in Provincial Guide • Physical beauty and grandeur • Strong Cultural & Historical experiences • Many natural settings in Communities, with opportunities to view “the River’s grandeur” • Safe and clean. • Food & accommodation services of Edmundston Region & Fredericton • Authentic attractions & activities 	<ul style="list-style-type: none"> • Lack of awareness and profiling of the Valley • Lack of knowledge of River’s size and grandeur • Some unattractive portions along the River Valley Route. • Lack of activities/ experiences related to the River.

6.6.5 The Positioning Statement

Requirements of an Effective Positioning Statement

The positioning statement must be broad enough to speak to the entire Valley’s offerings and features, yet narrow enough to capture the imagination of visitors.

The themes and calls-to-action (CTA) that we recommend must capture attention more for what the St. John River Valley is as it does for how it compares to competitive destinations. If we are successful in identifying the most appropriate theme and CTA, beneficial comparisons will be made without our prompting.

Positioning Statement

The Upper St. John River Valley is one of the longest rivers and largest watersheds feeding North America's Eastern Atlantic Seaboard.

Home to several founding cultural groups, including the Maliseet First Nations, French and English, the St. John River Valley is a historic pioneer trail and a waterway of scenic beauty and wonder that has fostered a rich agricultural tradition.

The Upper St. John River Valley offers superb touring and authentic experiences to families and couples seeking to sample its nature, trails, riverside greens and vistas as well as its cultural and heritage offerings.

6.6.6 Themes and Calls to Action

Several options for theming were presented at the Community Workshops, all stressing the size and role of the River as distinctive features. Preferences from each community workshop are shown in **Appendix A**. Eight (8) themes are proposed to be tested throughout the summer by the Department of Tourism and Parks, at intercept locations in the Valley as well as focus groups in various key New Brunswick markets.

- *The Grand River of Canada's East Coast*
- *Grand and Ancient Waterway to the Sea*
- *Eastern Canada's Grand River Valley*
- *Magnificent (Majestic) Riverway to the Sea*
- *Majestic Waterway of Atlantic Canada*
- *River Valley of Grand Discoveries*
- *The St. John River... Majestic Waterway to the Sea*
- *The St. John River ... "Appalachia to the Atlantic"*
- *The St. John River: A Beautiful Stretch of History*

In addition, adjectives used as descriptives of the River will be tested to see which is most appropriate in describing the river (Majestic, Grand, Magnificent, Legendary, Historic, etc.).

There are several "Call-to-Action" options for the Valley, which may be used as tag lines in advertising and promotion (**Table 13**). The choices for the Call to Action are intended to bring out the historic nature of the River and the Valley.

Table 13: Options for Calls-to-Action

- *Explore Our Legends*
- *Follow its Wander (Wonder)*
- *Enjoy the Grandness of its Wonders*
- *Take the Heritage ("Old") River Road... – xxx (fill in blank to fit different contexts)*

6.6.7 Positioning Rationale

1. The St. John River is the largest watershed on the North Atlantic Seaboard, a little known fact.
2. The positioning can be used for the entire River – not simply the Upper St. John River Valley.
3. Perception: Target markets do not have the information on which to base their opinion of the St. John River Valley. Until the completion of the new four-lane highway, the road along the Upper St. John River Valley was travelled by millions of visitors to Atlantic Canada, each year. In 2003, New Brunswick hosted 1.86 million visitors of which 46 % travelled through the River Valley. In spite of this, those who drove along its length and saw its immensity did not realise that they were experiencing the longest river and largest water shed of any river along the Atlantic seaboard. While these visitors may well have appreciated the physical beauty of and may even have absorbed some of the cultural experiences of the area, an important piece of information was not included in their understanding of the River and its valley.
4. These themes are targeted at: mature adults and culture and heritage enthusiasts as well as strengthen the River Valley=s appeal to the family target.
5. Implicit in the themes are learning opportunities – the size, immensity of the River as well as opportunity for several interpretive and activities/experiences.

7. PRODUCT DEVELOPMENT ANALYSIS

HIGHLIGHTS: Product Development

- Upper SJRV products tie into two core provincial themes: 1. Nature's Wonder, 2. Culture and Heritage and the potential exists for developing community-based natural and cultural tourism in SJRV with opportunities for local economic spin-off and jobs – in the long run.
- Two "icon" products/experiences that can be featured: Grand Falls Gorge and Kings Landing.
- **The "River Valley" experience/feeling** does not come across (particularly via the new Highway), moreover there is little to no River access or water-based activities (unlike other River regions).
- **Opportunities:** Develop La Bagosse as an experiential culinary "treat"; Profile Kingswood Park as a major family fun attraction; highlight Grand Falls Gorge as Signature Attraction; develop a major Valley-wide event in August; create a major event to link communities along river (e.g. Cycling, multi-cultural event); chance to link Arts/Crafts Events and artisans; strengthen summer Theatre; link cultural events; development of river and water-based experiences.
- **Product Development Partnerships:** can be established across communities for follow-up or spin-offs of major events (e.g. Plaster Rock Pond Hockey, Upper Madawaska with Fort Kent Biathlon)
- **Clusters:** Discovery Loops, Golf (affordable), Covered Bridges, Museums.
- **Music/Entertainment:** Jazz & Blues, Fiddling, Summer Theatre, some performing arts.
- **Winter Product:** inconsistent availability across Region; no major event except Edmundston; cross-country ski clusters not promoted.
- **Culture/Heritage Products:** There is potential for transforming dispersed cultural resources into demand supporters and generators – in the long term, if a concerted and organized effort is made.
- **Aboriginal/First Nations:** strong interest in tourism; potential for an Aboriginal (Maliseet) Product Discovery Area (Loop) with linkages to nearby centres.

7.1 Supply Side in a Nutshell

A snapshot of the supply side for the St. John River Valley is shown in **Table 14**. For the purpose of analyzing tourism supply this table summarizes content found in more detail elsewhere in the report.

Table 14: Upper SJRV Tourism “Supply Side” in a Nutshell

Supply Element	Details
<ul style="list-style-type: none"> Attractions 	<p>“Top” and “Must See” Attractions</p> <ul style="list-style-type: none"> Le Jardin Botanique: under utilized, used and promoted. Potential to integrate the theme for a “River in Bloom” and partner with other developing products in the province. (Strong interest in CTC product clubs) Grand Falls Gorge: under exploited, used and promoted. One of the most beautiful natural features in the Province;; need t encourage further exploration and interpretation of Gorge, geology and recognition as Signature Attraction. Hartland Covered Bridge: average stopping time = 20-30 minutes; additional critical mass required (e.g. dinner theatre, restaurant to serve large groups). Kings Landing: Anchor attraction; a large regional draw for the Valley. Mactaquac: Provincial Park and recreation area, multiple draws. Kingswood Park & Lynx: top family attraction; Signature golf course. Historic Garrison: numerous activities linked to Loyalist past. Numerous other attractions with no Provincial designation spread throughout Region. <p>Over 20 new projects in various stages of planning:</p> <ul style="list-style-type: none"> - Two Major Attractions: Tobique First Nations Village & Potato World. - Other Projects: Other project in the “demand supporter” or “traveler service” (e.g. gas station) categories. (See Appendix H).
<p>Forthcoming/ Potential</p>	
<ul style="list-style-type: none"> Other “Gems” Worth Discovering 	<ul style="list-style-type: none"> The Sentier NB Trail: located along the entire River – links Valley communities & Trans Canada trail, appropriate for walking, biking, snowmobiling, cross-country skiing. Unique features: 1. Length (about 400 continuous kms) 2. location along the River for most of route, and 3. spaced links between communities for access to services. Falls Brook Centre: a model sustainable development project with LOTS of opportunities to learn and experience the Province and environment. Visual Artists, Artisans and Crafters: Vibrant arts community in each hub and a proliferation of talented individuals who have not been showcased. Three strongly evident cultures: 1. French: République de Madawaska as well as, Grand Falls and Fredericton; unique and thriving culture of the le République; 2. English: from Grand Falls south to Fredericton, and 3. Maliseet First Nations, with five locations in the Valley. Universities of the Valley: Université de Moncton (Edmundston), New Brunswick Community College (Edmundston, Woodstock, Fredericton), the University of New Brunswick, St. Thomas University, College of Craft and Design. These education centres of creativity, innovation and excellence are attracting new Canadians, multiculturalism and facilities that can be better used. River Communities and “River Greens”: River front areas boast built heritage backdrop and close access to nature; often serve as Trail Heads for trails on former rail beds; Picnic areas located along River banks exist in almost ALL communities; key Community Focal Points can serve to stimulate economic spin-offs as they are close to shops and services. Can serve as a “stopping” for families and couples; a launching point for community economic spin-off and access point for the NB Trail. Ambiance created by access to nature and built heritage backdrop.

Continued...

Table 14 (Continued...)

<p>Other Gems Worth Discovering (Cont'd.)</p>	<ul style="list-style-type: none"> • Community Stories: Those that have never been told. Potential for communities to develop living history and cultural experiences. Build on the programming of Kings Landing and extend concept of presenting the Upper Valley as an ecomuseum (museum without walls). • Discovery Loops/Scenic Byways: Seven (7) “Discovery Loops” identified in report with potential clustering for demand supporters. • Cultural Celebrations – augmenting existing events, clustering with visual arts and crafters; There are no major festivals during August. • Clusters: Discovery Loops, Artists, Golf, Museums, Covered Bridges, and Botanical/ Gardening Potential.
<ul style="list-style-type: none"> • Accommodations: 	<p>27% of New Brunswick’s accommodation base; 2,935 units (Hotel/Motel = 65%); 50% located in Fredericton; Avg. Occupancy: 51-65% (highest July-Aug: 69-87%); 12 high quality campgrounds.</p>
<ul style="list-style-type: none"> • Restaurants 	<p>Seasonality and quality an issue; Weak mix; thin on the fine dining side; very little in winter; No existing inventory of mix, open seasons or hours.</p>
<ul style="list-style-type: none"> • Other Traveler Services 	<p>Signage, infrastructure, facilities open: Signage – identified as needing attention at both Highway & Municipal levels; Seasonality – no direction/information provided to travelers during off-peak season (“everything is closed”) – information provision a particular issue; dining options limited in winter.</p>
<ul style="list-style-type: none"> • Tourism Organization(s) 	<p>There are several organizations responsible for tourism. The key is coordination among these stakeholder groups.</p> <ul style="list-style-type: none"> • Regional Tourism Associations (RTAs): Edmundston-Madawaska Office du Tourisme, SJRV Tourism Association (Perth-Andover/ Nackawic; Mactaquac Country). Greater Fredericton Tourism Association. • Destination Marketing Organizations (DMOs): OTEM (Ed/Mad), Fredericton Tourism, Greater Woodstock Tourism Partnership, SJRV Tourism Assoc. • Museums, Arts & Culture, Heritage Organizations (new Museum Zones) • CEDAs: Madawaska, Grand Falls, Carleton, Central, Fredericton.
<ul style="list-style-type: none"> • Tourism Marketing 	<p>Cooperative partnerships need to be forged including Provincial and Regional, publications, website, mapping etc. Valley branding and theming are critical. Select groups attend consumer and trade shows in Ontario, Quebec and New England.</p>
<ul style="list-style-type: none"> • Product Development 	<ul style="list-style-type: none"> • Overall destination appeal and awareness of products is low • Many products need to be strengthened, increase market-ready appeal in order to attract and re-attract visitors to the area. • Existing products with low appeal need to be bundled thematically into saleable products, i.e. smaller attractions into Upper St. John River Valley ecomuseum; (ACOA assistance), jointly marketed; local restaurants integrated into Studio Map; Themed Discovery Areas/Loops.

7.2 Cultural Tourism Products in the Upper SJRV

While there are several nature-based attractions in the Upper SJRV, little attention has been devoted to the cultural dimension of the Valley. This section provides an analysis of the cultural tourism potential in the St. John River Valley. This type of tourism is recognized as providing unique and authentic visitor experiences while being capable of generating revenue and increasing visits to regions. Cultural tourism also holds appeal for the nature touring visitor -- assisting to build a "total vacation experience." (Additional cultural pointers are noted in **Appendix I.**)

HIGHLIGHTS: Cultural Tourism Analysis

- Cultural resources can be organized to provide authentic visitor experiences and extend length of stay in the Upper SJRV by developing: a Valley Cultural Events calendar, studio map, route and open day; an event tourism strategy.
- Opportunities exist to bundle and augment cultural resources to develop **new products** (studio map and tour; ecomuseum; residential forms of learning vacations).
- Heritage can be developed into new products and new attractions for the Upper SJRV through networking for: Community interpretation, Elderhostel, Upper St. John River Valley Ecomuseum (a "museum without walls" or a "territory museum").
- Culinary tourism links back to local economy, and in the long-term could be the "jewel" that distinguishes the Upper SJRV.
- A strong "arts and crafts" cluster has potential appeal to art enthusiasts and craft lovers.
- Clusters of resources (community histories; built heritage, museums, galleries; arts, crafts) can be networked into distinct offerings (community interpretation; festivals, events)

• Types of Cultural Tourism

The Valley, with its rich multicultural heritage, vibrant natural heritage and city, town, village and rural cultures has potential for developing sustainable community based cultural tourism.

Cultural tourism broadly defined includes many types of tourism: such as, special interest tourism, heritage tourism, culinary tourism, religious tourism and event tourism.

The World Tourism Organization (1998;77) identifies types of special interest tourism with a cultural flare as "*based on unusual or interesting local attractions that typically do not require major capital investments and can benefit local communities*". Such forms of cultural tourism include garden tourism; village tourism; river tourism; farm and rural tourism; roots tourism; road touring tourism; Elderhostel; cultural exchange and study tours (World Tourism Organization, 1998).

In Canada, **heritage enthusiasts** are tourists who participate in multiple heritage activities, the most popular being museums, farmers markets and visiting historic sites. There is a strong link between heritage tourism enthusiasts and outdoor enthusiasts suggests opportunities for cross promotion (CTC, 2001). This is a good fit for the Valley as heritage activities compliment abundant outdoor activities, for example, The New Brunswick Trail.

There is a growing interest in **culinary tourism** – traveling to experience culture through food and drink. The development of culinary tourism could be important to the Valley because of linkages back to the local economy (agriculture, restaurants, shops, accommodations). This could eventually be one of the "jewels" that will differentiate the Valley from other destinations.

7. Product Development Analysis

The Valley, with varied culinary traditions is a centre for potato harvesting and food production (Florenceville, Hartland and Grand Falls), culinary training (Edmundston) culinary excellence (e.g. Auberge du Jardin and several Fredericton locations), culinary with history connections (e.g. John Gyles Restaurant, Woodstock) local restaurants (such as Kings Landing, York's Restaurant in Perth-Andover, Gramma's Restaurant in Centreville) and farmers' markets (Woodstock, Fredericton and potentially Grand Falls). It includes various activities (**Table 15**).

Table 15: Culinary Tourism Activities

- Eating and drinking at a hard to find "locals only" restaurant or bar
- Attending cooking classes
- Driving a culinary route
- Meeting the chef/owner of a noted restaurant
- Searching for hard to find food ingredients (farm and farmers markets, u-picks, local shops)
- Staying on a farm

Source: International Culinary Tourism Association, Wolf, 2002.

• Visual and Performing Arts and Artisans

In the River Valley existing public and commercial art galleries and artists and crafters studios need to be linked and networked to increase profile and ability to attract art enthusiasts. In many jurisdictions the arts and crafts sectors and the tourism industry do not effectively work together. In the Valley the tourism industry needs to work with the New Brunswick Arts Alliance, Arts Board and Crafts Council in developing and facilitating opportunities for turning arts into market ready products for tourists. In some areas of the world, for example Japan, craftspeople are declared as "living national treasures". Such a development in the Valley would nurture the development and preservation of unique art and craft traditions of the region, for example the traditional weaving and contemporary woodworking.

"Performers and artisans represent "living" cultures or living links to past cultures."

Source: McKercher and duCros, 2002

• Cultural Analysis and Themes in the St. John River Valley

The strengths and weaknesses of the Valley's cultural resources are presented in **Table 16**.

Table 16: St. John River Valley Cultural Resources Strengths and Weaknesses

Strengths	Weaknesses
<ul style="list-style-type: none"> • Demand Generators: Several major anchor cultural attractions (Historic Garrison District; Kings Landing; Grand Falls Gorge; Le Jardin Botanical Gardens) • Demand Supporters: Artists/crafts studios (i.e. Maurice Gamblin, Perth Andover, Vicky Lentz Edmundston); Cultural Events (Le Salon de Livre, Paint the Hartland Festival, Symposium des arts visuals etc.) • Themes: Rich cultural themes (Madawaska; Aboriginal Legends; Loyalist History; New Denmark, Agriculture, etc.) • Critical Mass: Number and variety of smaller attractions • Operational: Core of committed heritage management professionals and volunteers. • Networking: Madawaska Museum Zone; Central Valley Museum Zone; SJRVTA. • Clustering: Significant Fredericton arts and crafts cluster. • Education: Presence of Universities in Fredericton, Edmundston; College of Craft and Design; Woodstock NBCC-Cultural diversity/Centres of Excellence. 	<ul style="list-style-type: none"> • Demand Generators: Need for additional: bundle smaller attractions ecomuseum to create larger attraction; Some experiences need to be authenticated. • Demand Supporters: Smaller attractions (museums) not all market ready. • Themes: Many not developed into product, (i.e. story of Tappin Adney). Many not appropriately themed • Critical Mass: Lacking in some areas, i.e. Perth Andover • Operational: Seasonality seasons of smaller attractions (museums); dependence on student summer grants to open; service quality • Networking: lack of coordination, i.e. events, artists and crafters studios • River Access: ways to experience the River not interpreted or highlighted • Seasonal Access: Few museums are open during winter.

In terms of attributes, the cultural assets represented by the museums and galleries are analyzed for their potential stories (**Table 17**). Themes that emerge can be used to form products and packaging for the River Valley. These outcomes are outlined in the recommendations section of the Report.

Table 17: Themes Represented by the Museums, Galleries in the Upper SJRV

Themes	Museums & Galleries
1. <i>Contemporary and Local Art</i>	Beaverbrook Art Gallery, UNB Art Centre, Laura McCain Gallery, numerous other galleries in the Region.
2. <i>Aboriginal Legends/ Connections</i>	4 Bands on the River, Malobeam Centre, Les Jardins, Kings Landing and intended Tobique Interpretation Village.
3. <i>Settlers and Life in the St. John River Valley – 18th and 19th Century</i>	Kings Landing, Grand Falls Museum, Potato Museum Clair Historical Society, New Denmark Memorial Museum
4. <i>Historic Architecture</i>	Kings Landing, Woodstock & Fredericton homes
5. <i>Military History</i>	York Sunbury Museum, Le Fortin du P'tit Sault
6. <i>Religious History</i>	Le musée des religieuses hospitalières, Bernier House, Musée de Chapelle, Churches of the Valley
7. <i>Early Settlement History</i>	Maison Cyr, Société Historique de Claire, New Denmark Museum, Southern Victoria Historical Museum, Kings Landing, Madawaska Museum, Potato World, Woodstock Court House, Connell House, Provincial Archives
8. <i>Natural History and Science</i>	Grand Falls Gorge (geology), Science East, Fredericton; The Watershed and Major tributaries to the St. John River.
9. <i>People, Pastimes and Institutions</i>	School Days Museum, Fredericton, Nursing Resource Centre, Fredericton, Carleton County Court House, Woodstock, Sports Hall of Fame, Fredericton and others.
10. <i>New Brunswick Firsts</i>	Sports Hall of Fame, Fredericton, Kings Landing Antique Automobile Museum, Saint Jacques

7. Product Development Analysis

Table 18 highlights cultural and heritage product gaps found in the Valley. Strong product clusters in the aboriginal, culture, heritage, and arts and crafts areas. Visual arts and crafts/artisans, and gallery categories suggest the need to develop a studio map, studio tour and promote studio open). Most galleries listed are not for profit entities, accessible to the public providing public programs.

Table 18: Culture and Heritage Product Gaps

PRODUCT	GAPS	OPPORTUNITIES
CULTURE & HERITAGE		
Aboriginal Tourism (5 First Nations in region)	Strong potential – fragmented efforts Slow development, need focus and complementarity Growing base of events: Pow wows and aboriginal festivals, some activity packaging	- Locator map ... - Aboriginal Product Discovery Area - Linkages with nearby centers, discovery areas... - Aboriginal crafters on Studio Map
Multiculturalism	Francophone Identity: Brayon theme: controversial Acadian presence - English: Scottish, Loyalist, Danish	Gems: Edmundston, New Denmark, Fredericton; Florenceville multicultural presence. Excellent potential – Cultural Trail linking Madawaska NB & Maine
Heritage	Strong base in Fredericton (tied with Capital City, Clarify Garrison District) Good base in Woodstock (demand supporters, needs heritage preservation measures) Some mixed in Edmundston (military, legendary Republic, religious...)	Potential: Build travel learn and Elderhostel packages with Garrison District, Kings Landing, Woodstock Opportunity: to combine small museums and sites in Upper SJRV as an ecomuseum; Built heritage backdrop for river front greens and river town atmosphere must be recognized and preserved.
ARTS & CRAFTS		
Festivals	Link festivals: Paint the Hartland, NB Crafts Council Fredericton Show; Symposium des Arts Visuels, Edmundston & Fredericton Jazz Festivals.	Clustering and positioning on studio map for Valley. Potential woodcarving/wood working/ wood turners festival.
Galleries	Links: Fredericton, Edmundston, Woodstock – excellent base of galleries	Highlight galleries – particularly those open year round.

7.3 Nature-Based Tourism and Trail Products in the Upper SJRV

HIGHLIGHTS: SJRV Nature-Based and Trail Products

- The nature-based touring product is strong with several key demand generators in this category: 1. Grand Falls Gorge, 2. Mactaquac Provincial Park, 3. N.B. Botanical Garden; 4. de la République Provincial Park. Opportunities to develop new nature-based experiences.
- Trails should be emphasized as a key tourism product; Trail Clusters are strong for nature product. Examples include:
 - a) Edmundston: le Petit Témis and local touring
 - b) Grand Falls & Perth-Andover to Woodstock: around Gorge, Perth (hub of Trans Canada Trail, Appalachian and NB Trail coming together), Woodstock (Meduxnekeag Trail, a strong Nature product), Maliseet Trail, Hartland (Waterfront and Becaquimec Nature Trails),
 - c) Fredericton (70 km system + parks).
- The gaps in the main trunk of the NB Trail (i.e. from Edmundston to Grand Falls) provide the alternative of using local roads (former scenic or new scenic drive sections) to avoid the highway.
- Trails (especially the NB Trail) may not be 100% market ready but lack of services sometimes strengthens trail appeal.
- Trail maps are required for broad distribution (print and electronic) to make travelers aware of connections, distance, length and services provided (or not) – when this is available, expectations are met. Maps with designated distances, ease of use, highlighting scenic features and points worth stopping are required to entice visitors to use trails.
- Trails are strong community link projects that can be reinforced over the next 3 - 5 years.
- There is an opportunity to promote a major cycling or marathon event, serving to bring the Valley together.
- Tourism operators, such as B&Bs, Restaurants, and Retail establishments, are interested in catering to the trail users
- In order to have a stronger river valley touring and discovery product to support product clusters - both land and water trails should be considered, noted as “discovery routes.
- An internal product development strategy for Trails has been developed for the Department of Tourism and Parks, which is integrated with the capital management structure of the NB Trails Council. Two sections the New Brunswick trail located in the St. John River Valley have been designated as multi day adventure trails of 75 kms.
- Unfortunately, there is no road or trail directional signage (exists only on specific trail sections) and very little interpretive signage. Moreover there is high ATV abuse on several sections with minimal regular enforcement.

Opportunities (identified by Tourism and Parks)

- The portion of the NB trail between Grand Falls and Woodstock connects 12 communities, 16 if extended to Edmundston
- Most picturesque River Experience in Atlantic Canada
- 1 Top Event en route: Woodstock Old Home Week
- **Accommodations en route:** 12 Campgrounds, 15 Hotels/Motels, 22 B&Bs, 3 Inns.
- **Demand Supporters en route:** 2 Historic Sites, 2 Museums, 4 Golf Courses, 2 Art Galleries
- 1 Day Adventure, 0 Multi-day Adventure Packages

Although the potential is there, there still are questions as to market readiness. **Table 19** can be useful as a guide to provide benchmarks and highlight various sections as Trail improvements are made. Nature based tourism gaps related to trail development are outlined in **Table 19**.

7. Product Development Analysis

The St. John River Valley is the scenic drive with **the most developed trail system(s) in the Province**. The trail product needs to be strengthened in order to allow visitors to discover the area. In 2004, the NB Trails Council is assigning priority to strengthening the Woodstock to Grand Falls portion. Although the entire River Valley does not have a fully completed “main trunk” of the trail (it is not fully developed from Grand Falls to Edmundston), secondary roads have the ability to fill the gaps – thus creating a route through the entire River Valley (from Edmundston to Saint John). The trail(s) most often run parallel to the river with opportunities for scenic viewing and community stop offs.

Table 19: Trail and Nature-Based Tourism Product Gaps

CATEGORY	GAPS	OPPORTUNITIES
TRAILS & TOURS	Tourists now expect trails as they travel, focus on value-added	Cross promotion: heritage enthusiasts and outdoor adventure types
Incl. walking, guided, drive		
NB Trail Network	Most completed trail network in NB, but not promoted or developed for tourism Important gaps in main trunk: - Edmundston to Grand Falls - Woodstock to Fredericton But many local riverfront trails and parks to tie into (community-based)	Strong clusters to build on: Petit Témis (Edm – Que) (130 km) St John River Valley Trail (Grand Falls to Woodstock (111 km) Fredericton Trail and Parks (70 km) Mactaquac Park Work closely with NBTCI, local trail sponsors, Tourism Operators to access, promote services along Trail
Other major trails	Perth-Andover as key location to tie into trails (NB Trail, Appalachian, TCT) Maliseet Trail – under utilized? (gem: Hayes Falls, link St-Croix)	Opportunities also exist for joint use by N.B. Trails and scenic Drive users of Facilities at community “River Greens” (i.e. washrooms, visitor information)
Other local trails	Some walking tours in larger communities (focus on heritage: ex – Edmundston, Woodstock, Fredericton)	Self-guided and guided tours in all areas, tie in parks and trailheads TRY TO TIE IN WATER & LAND
NATURE & ECOTOURISM	VS. consumptive activities (fish & Hunt, ATV’s if not well controlled)	
Water recreation	Very limited access to the water	Identify trailheads
	Very few activity-based products	Expand Grand Falls Gorge Pontoon (interpretation) experience.
Sustainable development resources	Some Nature-based projects in place: - Forêt expérimentale (Madawaska) - CESAB Grand Falls - Groupe Témiscouata (Edm) - Falls Brook Centre - Meduxnekeag Watershed - Ducks Unlimited, Fredericton - Beachwood Dam - Lac Glazier	The St John River Society is in the process of applying for heritage river status for the St. John River. (The only other Heritage Rivers in the province are: the St. Croix, Upper Restigouche, Miramichi).
Activities	Wildlife viewing (no whales, seals, shore birds, zoos, aquariums....)	Strong potential for birding Other wildlife viewing (ex: Tobique)
Species Lists	Falls Brook Centre produces several species lists: Trees, Shrubs, Birds in four (4) languages (English, French, Maliseet, MicMac)	Opportunity to partner and more widely distribute this information in both electronic and print formats.

7.4 PACKAGING ANALYSIS

HIGHLIGHTS: Product Packaging Analysis

- While existing package offerings are limited, the Upper St John River Valley today has potential for new products and packaging as these are underdeveloped and existing packaging efforts are fragmented.
- There is opportunity to leverage partnerships up and down the valley as so few currently exist.
- Opportunities exist to weave our stories and legends into packages focusing on animation and interpretation, to take advantage of our rich living heritage and French, English and Aboriginal cultures.
- Options recommended for product/packaging in FIT, travel learn, group are the means for River Valley communities to start the strategic market and product development process.

7.4.1 Overview of Available Packages

Existing packaging efforts in the Upper St. John River area are limited.

- **Lack of Packages:** There is a lack of activities, particularly in outdoors and nature is reflected in the province's official tourism publications. For the Summer of 2004, the Upper St. John River Valley has only 3 *Great Day Experiences* of the 70 packages presented in the Natural Wonders, Coastal and Cultural categories. The Bay of Fundy has by far the strongest packaging strategy, with a wide range of activities, including a major focus of whale-watching. Even under the *Rivers & Inland Waterways* section of Natural Wonders, the few Great Day Experiences available are situated along the Miramichi and the Restigouche Rivers.
- **Types of Packages:** The Upper St. John River Valley is only represented in the *Cultural category* (3 of 13). These activities are all based in Fredericton: *first nation's craft or a day in a soldier's life*, presented by Fredericton Tourism and *art works for children* presented by the Beaverbrook Art Gallery. These are in the \$8 – 12 / person price range.
- **Getaway (multi-day) Packages,** the Upper St. John River has a better presence in golfing (3/3) all Fredericton (Lynx and Mactaquac), romantic (4/13) and spa (1/2) at high-end B&B's in Grand Falls and in the Fredericton area, family (2/12) in Fredericton (Kingswood & Wolastook) and outdoors (1/7) with the Gorge pontoon and camping. There are no Getaway packages in the cultural category, which should be one of the strongest products in the Upper St. John River Valley region.
- **Romantic Getaways:** presented by the high end operators in Grand Falls, Mactaquac and Fredericton.
- **Summer Packages:** none In the Edmundston area, but there is a romance package in the *Winter/Spring 2003 Travel Guide*. Woodstock and other areas in the central area of the scenic drive are not represented at all.

7. Product Development Analysis

- **Winter Packages:** Edmundston, Grand Falls and Fredericton are positioned with snowmobiling packages and some outdoor activity.
- **Golf Packages:** The golf product is well represented with additional packages offered through the NB Golf web site to increase the offering through the *Summer Guide* with extra packages from Edmundston and Fredericton, in addition to a New Brunswick/Atlantic signature golf courses with large high-end hotels. Example : Fredericton (Delta/Lynx), Moncton (Chateau/Royal Oaks) and St. Andrews (Algonquin Hotel/Golf).

A series of suggested packaged experiences that can be targeted at consumer, group and travel learn markets are offered in **Appendix L (Tables L-1 to L-4)**. Packages for both the Group Travel and the Travel Learn market have the potential for broader consumption, once tested and refined.

There are several interesting stories and perspectives that can be integrated into packaged experiences shown in **Appendix M**.

7.5 Product Gaps and Opportunities

Key demand generating product gaps and opportunities are presented in **Table 20**. Additional product gaps are noted in **Table 21**.

7. Product Development Analysis

Table 20: General and Demand Generating Product Gaps and Opportunities

PRODUCT	GAPS	OPPORTUNITIES
GENERAL	Need stronger branding like Bay of Fundy recommended experiences	River Valley Experience
	No strong product/ demand generator/ icon i.e.; national park, natural wonder (Fundy), whale watching, Acadian Coast, seafood	Focus on nature's wonder (The gorge, the river, trails) and Culture & Heritage
	Fragmented Product Mix, low yield	Discovery areas, themes and loops
	Key facts and interesting people	Weave the story
	Two provincial parks	Cross-promotion (strong camping and outdoor activities)
<i>Note: Below -> 1st number = # in Region; second number = # in Province</i>		
NB TOP ATTRACTIONS	2 core themes, although could be enhanced (natural, cultural)	
Family Fun 0 / 3	All Moncton	<i>Kingswood Park, Fredericton</i>
Nature's Wonders 3 / 7	Fundy – very strong	<i>Grand Falls Gorge – highlight as possible signature attraction * encourage further exploration of Falls & Gorge (la Rochelle, walk, tours) Botanical Garden & Prov. Park – under-utilized, possible linkages</i>
Cultural & Heritage 4 / 11	All in Fredericton area, except Hartland Bridge	More focus on living history, culture, arts & crafts, built community heritage and main streets.
Coastal Attractions 0 / 8	Not a coastal area, reduces base #	Need to Increase in other categories (compensate with river/water activities)
TOTAL: 7 / 29	Geographically: Edmundston 1; Central SJRV 2 (GF, Hartland); Fredericton 4	
FESTIVALS & EVENTS		
NB Top Festivals List (Summer guide)	<i>SJRV Top Festivals - Combination of :</i>	<ul style="list-style-type: none"> - Major Event gap in August - Major Event gap in Grand Falls - Coordinated (entire) River Event gap (cycling or multi-cultural) - Reinforce offering in central area - Build on existing (raise classification): - Fiddlers on the Tobique - Arts & Crafts events (key areas) <ul style="list-style-type: none"> o Summer Theatre (ex Edm) o Grand Falls & Hartland o Fredericton (many) - Opportunities from major events (follow-up or spin-offs) ie: Plaster Rock Pond Hockey, Upper Madawaska with Fort Kent Biathlon – related cultural events with Maine Arts Council - Possible major events with NB Trail
May 1 / 1	Jazz & Blues (Edm & Fred)	
June 1 / 5	Agr. Exhibition (Fred)	
July 3 / 11	Woodstock Old Home Week	
August 0 / 6	NB Highland Games & Scottish Festival	
Sept 2 / 3	<i>SJRV Others</i>	
Oct 0 / 1	- 2 potato themes: GF & Hartland	
TOTAL: 7 / 27	Geographically: <ul style="list-style-type: none"> - Edmundston 3 - Central SJRV 1 (Woodstock) - Fredericton 3 	

Table 21: Additional Product Gaps

PRODUCT	GAPS	OPPORTUNITIES
OTHERS		
Music & entertainment	Fragmented throughout the region	Certain themes are emerging: <ul style="list-style-type: none"> - Jazz & Blues - Fiddling - Summer theatres - Performing arts
Golf 12 / 43 (NB)	Fairly good network, but not necessarily high-end, except Fredericton: Profiled in Provincial Travel Guide <ul style="list-style-type: none"> - Edm, Fred, Central (spread out) - Packages mostly Fredericton - # Courses: 9-hole (5), 19-hole (7) 	Fredericton cluster Lynx at Kingswood (best new course in Canada – Golf Digest 2004) Signature Golf packages with St. Andrews and Moncton <ul style="list-style-type: none"> - Could promote Hartland and other smaller course for family fun (cottages on site) - Very Affordable and diverse golf product
Winter	Not consistent through region; snowmobiling profiled for the North. No major event, except Edmundston, some cross-border effort in Woodstock Downhill ski – gap with Mt Farlagne Cross-country clusters (not promoted)	644 kms of snowmobile trails (New Brunswick-Maine) Lengths and availability of trails for cross-country skiing NB Trail access and use for cross-country ski market (multi-use trail)
Spring	Sugar bush/maple syrup production clusters not linked or profiled Fishing/Angling profiled in limited way	Howard Brook Organic Maple Syrup; largest producer in Eastern Canada; Kenneth Maple Farms large exporter. Strengthen activity profile and highlight tournaments.
Fall	Autumn opening hours limited.	Fall foliage touring; studio touring; encouraging more open hours.

8. TRAVELER SERVICES

8.1 Accommodations

HIGHLIGHTS: Accommodation Sector

- With an inventory of approximately 2,935 units, there is a range of accommodation types in the Upper St. John River Valley. The offerings, services offered and quality are inconsistent. Product development has been limited, with the exception of the campground sector (public and private) and a few character inns. Fredericton
- **Roofed Accommodations:** facilities tend to be older, catering to the traditional tourism market and commercial travel. More recent development of some heritage properties has been spread out and not yet packaged or promoted. At the other end of the spectrum is an older accommodation base with at least 10 motels graded at 1½ to 2 stars. These tend to be more visible, i.e. roadside and some appear to be dated. At least 9 accommodation operators are being by-passed by the new TCH.
- **B&B's and Small Inns:** An interesting base of high-end B&B's with 2-5 rooms are located throughout the region, with a few heritage properties and fine dining possibilities.
- Quite impressive is the array of 19 high quality B&B's (small inns) with an inventory of over 60 rooms.
- **Outfitters:** There are a limited number of outfitters, primarily located in Carleton County.
- **Campgrounds:** There are 19 campgrounds located in the Upper St. John River Valley, with an inventory of approximately 2,370 sites of which about 60% are fully serviced. Campgrounds are generally of high quality, close to access routes, well maintained and attractive.

Key observations on the accommodation base are shown in **Table 22**.

Additional highlights on the Accommodation base are presented in **Appendix K**, including an analysis of: a) accommodation by star rating, b) character B&Bs and Inn's for potential partnerships, programming and packaging, a list of operators by-passed by the new highway, the "retro motel" concept; provincial campground visitation.

Roofed Accommodation Occupancy Rates

With a total inventory of approximately 2,935 roofed occupancy units, the overall occupancy rate in the Valley ranges from 51% in the Central Valley to a high of 65% in the Fredericton area. Summer months are key, with Fall second in occupancy levels. **Table 23** clearly shows the need to strengthen spring and winter seasons.

Table 22: Upper SJRV -- Key Observations on Accommodation Base

TYPE	Edmundston	Grand Falls	Woodstock	Others	Fredericton
Hotels / Motels Total: <u>2,292</u>	Total 500 rooms Larger operators (60 – 100 rooms): Hotel République Howard Johnson Avg 2½H to 3½H Smaller operators (10 – 40 rooms) Avg 1½H to 2½H Upper Madawaska Very limited 40 rooms total	Total 165 rooms Larger operator: Près du Lac (83) Avg 2½H to 3½H	Total 135 rooms Larger operator: Econolodge (50) Avg 2½H to 3½H	Total 162 rooms Florenceville 60 rooms Avg 2½H to 3H Plaster Rock 38 rooms Avg 1½H to 3H Perth-Andover 38 rooms Avg 2½H Hartland 26 rooms Avg 1½H to 2½H	1330 rooms Larger operators: (100 – 200 rooms) Beaverbrook Delta Holliday Inn Ramada Fredericton Inn Wandlyn Inn Avg 3½H to 4H Smaller operators Avg 2½H
B&B's/ Inns Total: <u>187</u>	Total 39 rooms (3 operators/ 30 rooms 4H to 4½H)	Total 48 rooms (1 operator/5 rooms 4½H) 1 operator / 35 rooms Mt Assomption	Total 17 rooms (6 operators/12 rooms 3H to 4½H)	Total 33 rooms Perth-Andover 14 Avg 1½H to 3H Hartland 19 Avg 2½H to 4H	50 rooms (9 of 12 operators / 39 rooms) 3½H to 5H)
Camp-grounds Total: <u>2,369</u>	Total 412 sites Parc République 156 sites F- 3H R- 2½H Upper Madawaska Very limited In addition: St-Leonard Total 190 sites F- 2½H R- 1 to 2½H	Total 632 sites Paradis de la Petite Montagne 229 sites * Gorge/Falls 25 Avg F- 3 to 4H R- 2½ to 3H	Total 275 sites Yogi Bear 160 sites F- 3H R- 5H	Total 240 sites Florenceville 110 sites F- 1½ to 3H R- 1 to 2½ H Perth-Andover 80 sites F- 2 to 3H R-1 to 2½H Plaster Rock 50 sites F- 2½H R- 2½H	Total 810 sites Mactaquac Park 303 sites F- 3H R- 4½H Hartt Island 116 sites F- 3½H R-3H

Source: TAP 2004 Travel Guide; licensed operators; excludes outfitters.

Table 23: Roofed Accommodation Occupancy Rates by Area and Season

Location	# Rooms	Overall	Winter	Spring	Summer	Fall
	Approx.	Occup.	(D,J,F)	(M,A,M)	(J,J,A)	(S,O,N)
Edmundston	527	54.0	30.3	42.3	77.7	46.0
Quebec Border to Grand Falls	400	60.0	40.3	53.0	87.0	59.7
Grand Falls to Woodstock	339	53.0	33.0	35.3	74.7	52.3
Woodstock to Fredericton	216	51.0	26.7	33.7	69.7	37.3
Fredericton	1,453	65.0	45.7	58.7	74.7	65.0

Note: Overall Average Occupancy for Region: Approx 55%.

Source: NB Roofed Accommodations Occupancy Rates, 2003.

8.2 Restaurants/Eating Establishments

HIGHLIGHTS – Upper SJRV Restaurants/Eating Establishments

- There are approximately 200 restaurants in the Upper SJRV, of varying quality, most of which fall into the “fast food” category.
- There is a shortage of fine dining establishments in the Upper SJRV. Of the over 100 food establishments in Fredericton, only a handful (less than 10) offer fine dining. The Edmundston area boasts one fine dining establishment and the other is located in Hartland.
- There are few notable restaurants with a local flair, for which people are willing to travel several miles (e.g. Kings Landing’s seasonal cuisine, Yorks in Perth-Andover, Gramma’s in Centreville)
- Very few restaurants feature local cuisine (with the exception of Character Inn B&Bs and fine dining establishments.) – and lack of varieties and recipes using locally grown potatoes.
- The high end B&B’s/Inns offer limited evening dining, full breakfasts and meals upon requests. Some accommodations have restaurants on the premises ;some accommodation operators partner with food establishments.

There are approximately 208 different types of eating establishments in the Upper SJRV (**Table 24**). Several hotels/models offer dining facilities as well; these are profiled in **Appendix K-5**. Restaurant product gaps are noted in **Table 25**.

Table 24: Number and Type of Eating Establishments in the Upper SJRV*

Restaurant Type	Edmundston & Area	Grand Falls & Area	Woodstock Area	Fredericton Area
• Fine Dining	1	--	2	8
• Casual/Informal Dining	5	3	--	15
• Themed Family	3	--	4	8
• Pub/Informal	1	3	4	12
• Coffee/Sandwich Shop	2	6	7	9
• Fast Food	<u>10</u>	<u>21</u>	<u>19</u>	<u>65</u>
Totals	22	33	36	117

*Compiled **Sources:** Numbers are approximate; *Provincial Travel Publication and Online*, Local Travel Guides, Telephone Directories

Table 25: Restaurant Product Gaps

FOOD & CULINARY	GAPS	OPPORTUNITIES
Food Theme / Route	No theming or consistency in food offerings; many chains; Ex: new products : - NB wine route (5) all in southern NB - Acadian Peninsula Seafood Route - Taste of NB (NB Alcohol) - New in 2004: French chefs & artists (5 locations, including les Jardins Inn)	- Potatoes - tie in to Potato World and Agri- theme. Farming & Food Production - Possible farm tours, demo sites - Focus on GF, Florenceville, Centreville, Hartland - Integrate festivities: one major event throughout broad region (re-examine GF & Hartland Potato Festivals)
Regional cuisine	Not well developed; ploye (Madawaska), potatoes, fiddleheads, maple syrup and other products not used.	- Ploye and Bagoose story (Madawaska) - Capitalize on and serve recipes using local products.
Culinary experiences	Culinary Institute (CETA in Edm) not connecting with operators	Partnerships required for: Training, experiences, theme, support systems.
Food services	Few fine dining (fragmented) Home cooking Cafés	- Build on character B&B' and Inns – develop culinary themes, tie into product development of Valley - Where to eat in Canada? - Tie in Kings Landing Victorian meals
Farmers' Markets	Good base and strong interest in Grand Falls Developing in Woodstock	Tie in food themes, increase tourism readiness Examine U-pick possibilities Farm visits (ex; Brighton Botanicals)

8.3 Travel Routes and Signage

There are several levels of signage that need to be addressed for the St. John River Valley to position itself as a destination. The key observations associated with each level are highlighted below. Any approach taken must be phased in over time so that signage also speaks to the “brand” and overall strategy.

1. Trans Canada Highway Signage:

- **Strengths:** the River Valley Scenic Drive has existing designation and logo consistently used in tourism promotions. Positioning of Region and individual communities can take advantage of logo.
- **New Highway Issue:** Since communities are being “displaced” by re-routing of the Trans Canada, additional consideration must be given to re-directing visitors to the Scenic Drive and service areas where tourism and other businesses are located. (Jobs and revenues.)
- A weakness is that **only a few (5) River Valley Scenic Drive large highway signs exist** in the Upper Valley; two going south (south of Edmundston and before Kings Landing) and one going north (Charlie’s Lake road), one coming from the US Highway 195, and one near Perth Andover. Drivers unfamiliar with the route and Travel Guide are unaware of the multiple opportunities to “get on” and “off” the Drive. Moreover, the Travel Guide does not indicate exits, byways or really encourage any form of touring in the Upper SJRV. The Valley appears to be very weak in terms of product. Communities are listed but without any directions or connections.
- **DOT Permission:** At present, DOT will not grant permission for additional signs, suggesting that if it is done for one Scenic Drive, it must be done for all.

8. Traveler Services

- **A concerted and special effort** is needed to lobby for Highway signage. Cooperation and coordination is required between Provincial Departments (DOT & TAP), municipalities, planning commissions, and relevant players.
- **Costs:** Signs are approximately \$12,000 each (large River Valley Scenic Drive signs) and eight (8) additional signs are required – 4 traveling south and four traveling north. The goal is to reinforce opportunities to get on and off the Scenic Drive, thereby encouraging travelers to choose this route.

2. Community Based Signage:

- Ideally, every community in the Region would have complementary signage that designates it as part of “The Grand Waterway” or another chosen theme. If appropriately coordinated, this is realistic over a 5-10 year timeframe for the majority of communities. Again, it needs to be part of a broader package, theme, positioning if the partners buy into the process and make a commitment to work together. The hope is that the “tag line” (theme) will be agreed upon and used in future signage – long term.

For example, along the Drive, several communities have Welcome signage placed at entry ways. In the Madawaska region, there is some consistency in style and placement across 4-5 communities. In the mid Valley, signage is inconsistent; Florenceville has a very attractive and welcoming signage at entry ways.

3. VIC (Visitor Information Centre) and Full-Service Gas Station/Big Stop Signage:

- The use of Big Stops to distribute traveler information makes sense since these are a natural stopping point.
- The idea is to attract visitors' attention with a large poster placed at strategic spots within Big Stops and VICs. The on-site sign would show the River Valley map with an arrow noting: “You are Here; Visit our River Green Picnic Spot & Trail Head”.
- Restroom Signage: The sign would be reinforced by a replica (11x17”) placed on the inside door of bathroom stalls at the Big Stop and VICs.
- Visitor Information within the Big Stop should include high quality photography of natural, heritage and nature trails within each community.

4. “River Green” Signage:

- “River Green” picnic spots in each community offer opportunities for additional “surface interpretation, where the local area trails and key features can be identified on a large, protected map that visitors can view while stopped.

5. Interpretive Signage:

- Interpretive signage must be placed at the actual site of the historical event or natural feature being interpreted. The signage nodes along the heritage and nature trails within each community.
- Trail signage should be planned as part of a range of interpretive services, including brochures and publications – not as one-offs (Drew, 2001).

8.4 The Scenic Drive and Touring Loops

Scenic Drives have a scenic character composed of the visual and natural features along the road corridor. The scenic roads typically have winding curves, changes in elevation, eye pleasing vista's or other defining characteristics and provide a scenic experience to the person using the road.

What makes a Strong Scenic Drive?⁶

- Eye-pleasing vistas to the horizon.
- Winding Curves / curvilinear
- Farms and/or undeveloped and/or old open space
- Large roadside trees
- Historic Significance
- Grading changes / elevations
- Canopy cover
- Access to traveler services and things to see and do.
- Conducive to RV & Motorcoach travel.
- Appropriate signage

The St. John River Valley Drive is well established with “logo” signage and offers all of these options, including the viewing of old “Cathedral Pines” located along its shores. Each of the touring routes and the scenic drive possess the visual and natural features to provide an outstanding scenic experience. This experience is negatively impacted in some areas by off road views of quarry pits (i.e. River Road south of Grand Falls) and private properties that are not maintained. In addition the visual quality breaks down at the edges of some communities because of a lack of planning for strip development along the roadway. Design in these areas should consider landscape screening of negative views, coordinated signage and street tree planting. It is important to note that the scenic drive is “interrupted” by the new TCH from Hackshaw Bridge (Nackawic Exit) and also from Saint Basile to the Quebec Border.

The Upper SJRV has several product clusters that can be mapped – several examples are shown in **Figure 2**. (Golf clusters are not shown as these are well documented on the *Provincial Travel Guide & Map* and in the *Golf New Brunswick* brochure.

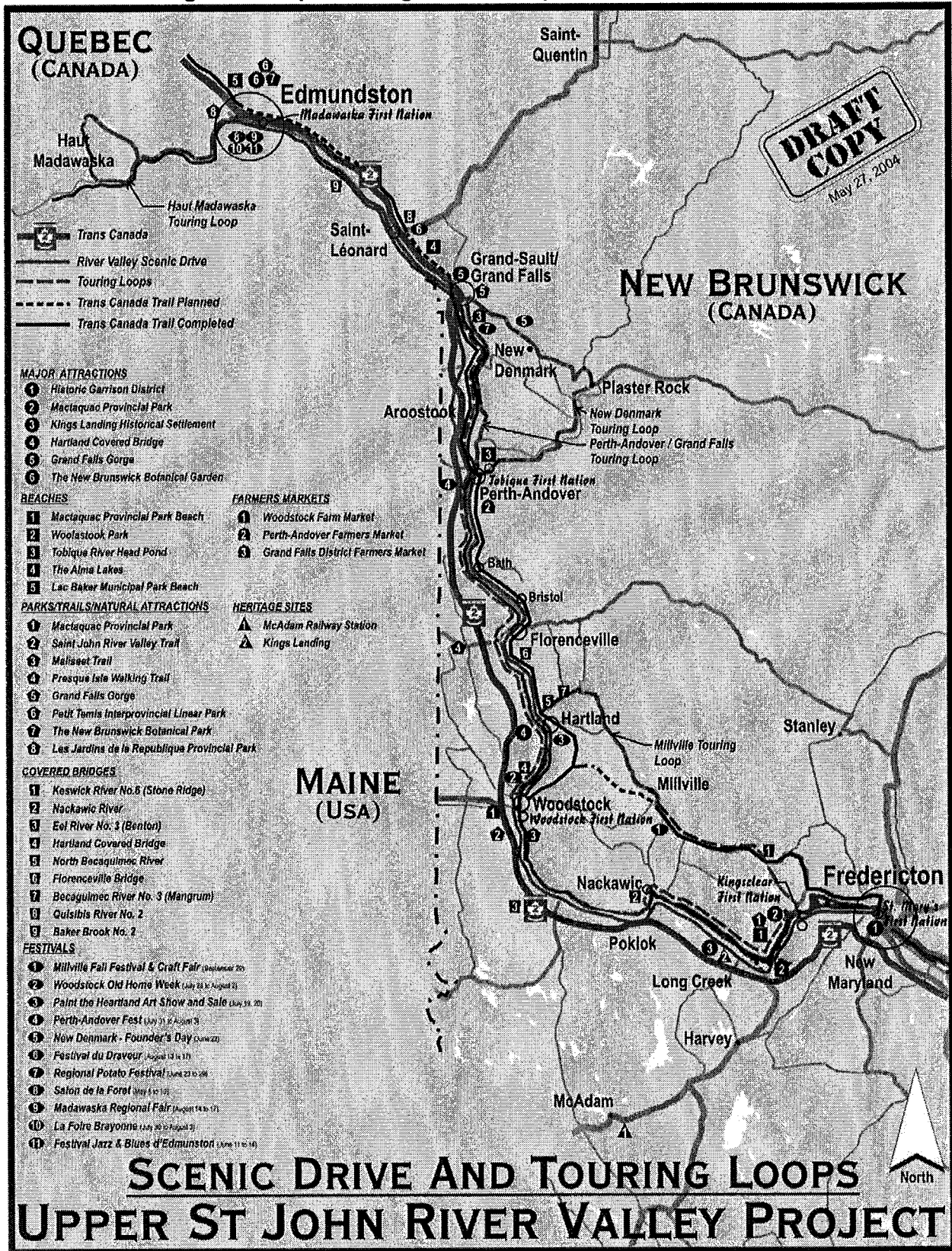
In addition to the above product clusters, seven (7) possible options for Scenic Drive Touring Loops along the Scenic Drive are noted below (**Table 26**).

Table 26 – Upper St. John River Valley Touring Loop Options

Loop	From / To	Viewing experiences
1. <i>Haut Madawaska Touring Loop</i>	Edmundston to Clair/LacBaker Loop	Connors, Lac Baker, Clair, River vistas Small town cultures, churches, historic sites.
2. <i>Falls and Rivers Loop</i>	Perth Andover/Grand Falls Touring Loop	Following river, Mountainous character, River vistas, Tobique First Nation (Aroostook and Tobique River mouths), Grand Falls Gorge
3. <i>Farms and Villages Loop</i>	Grand Falls - New Denmark - Plaster Rock/ Perth Andover	Open agricultural, Long views, New Denmark, Plaster Rock, Tobique First Nation
4. <i>Potato Farmlands Loop</i>	Hartland to Perth Andover	River Vistas, Florenceville, McCains, Longest Covered Bridge, historic sites/houses; artists/crafters.
5. Covered Bridges Loop	Florenceville to Hartland	River Vistas Covered bridges (5 accessible in this area)
6. Sunset Loop	Hartland-Woodstock-Millville-Mactaquac	Farmlands, Millville, Kingsclear First Nation, Mactaquac, Kings Landing
7. Historic Waterways Loop	Nackawic to Long's Creek	River vistas King's Landing

⁶ Source: Connecticut Trust for Historic Preservation

Figure 2: Map Showing Scenic Loops & Potential Clusters



8.5 Community Offerings & Services: Physical Design

8.5.1 Introduction

The upper St. John River Valley includes 11 cities, towns and villages and 5 First Nations settlements along its shoreline. These communities are spaced every 30 to 50 km along the scenic route, less than 1-hour drive between each. The majority of things to see and do (festivals and events, activities, tours, cultural and natural attractions, etc.) are centered on these communities. These communities are also the focus of support services (accommodations, food, visitor information services, shopping, etc.). These communities are the tangible evidence of the history and culture of the St. John River Valley, they are the physical results of people living and working along the Upper St. John River. These communities have a number of fascinating stories to tell:

- How did the towns get started, what industries?
- Who are the founding personalities?
- Where did they live?
- What is the natural environment of this section of the river?
- What is the history of the waterfront, what industries, floods, recreation?
- Who lives here now, where are there hangouts?
- Where are the best viewing areas and photographic opportunities?

The communities can each be viewed as an individual attraction but the strength of the community product in the St. John River Valley is the collective network of 11 communities, all a short distance apart, each with a distinctive character.

8.5.2 Positioning Communities: A Site Design Perspective

Communities that want to attract and hold visitors must show their best, emphasizing the unique historic, cultural and natural attributes of each community. To accomplish this requires a total community effort, bringing together the environmental community, heritage community, also municipal planning and operations focused on protecting and enhancing the unique natural and cultural aspects. The successful way to accomplish this is for communities to adopt sustainable tourism development principles. This forms a basis for positioning the communities of the Upper St. John River Valley. The principles of sustainable community tourism development include:

- Merge the economic benefits of tourism business development with efforts to enhance the social and environmental attributes of the community.
- Provide tourism development that satisfies the needs of both residents and tourists and safeguards the natural and cultural resource base.
- Provide tourism development that is based on the interpretation of the natural and cultural assets of each community.⁷

⁷ Source: *What Makes a Sustainable Community Tourism Destination* (BDA, EPG –2000)

8.5.3 Community Design Evaluation

Sustainable community tourism destinations that will successfully attract and hold tourists require certain physical infrastructure, this includes:

2018

1. An arrival experience on entry roadways that provides a high quality visual experience (i.e. street trees, views, historic landscapes and structures, etc.)
2. Easy access and way-finding to the historic core of the community on the riverfront.
3. On arrival at the core, the transition from car to pedestrian mode should offer clear orientation, visitor services, attractions, a parkland setting, pedestrian seating / viewing areas. A welcoming environment for the visitor.
4. A variety of (walking and cycling) routes to allow discovery of the heritage and natural attributes of the community as well as access to services. These routes and trails will also provide recreational opportunities for local residents.

Table 27 provides a snapshot evaluation of the tourism-related physical infrastructure for select communities in the Upper St. John River Valley. The evaluation is based on the “first impressions” visitors obtain when driving into respective communities. Additional communities are presented in Loops but are not on the Scenic Drive.

Table 27: “Visitor First Impressions” –Community Physical Design Evaluation

Primary Community Tourism Elements	COMMUNITIES										
	Edmundston	Saint Leonard	Grand Falls	Perth Andover	Bath	Bristol	Florenceville	Hartland	Woodstock	Nackawic	Fredericton
High Quality Arrival Experience				√	√	√	√	√	○	√	√
Ease of Access		√		√	√	√	√	√	√		√
Visitor Information Service	√		√	√				√	√		√
Waterfront Parks And Picnic Areas	√		√	√				√	√	√	√
High Quality Natural Setting			√		√	√	√	√	√	√	√
River Access	√		√	√				√	√	√	√
Heritage Architecture & Cultural Sites	√						√	√	√		√
Heritage Route / Trail	√				√	√	√	√	√	√	√
Quality Streetscape	√							√	○		√
Visible Welcome & Directional Signage	√	√	√	√			√		○		√
Access/proximity to Activities/Attractions	√		√						√	√	√
Readily Available Arts/Crafts	√		√				√		√		√

9. PRODUCT DEVELOPMENT STRATEGY

9.1 Guiding Principles for Product Development Suggestions

This section outlines an approach for product development that includes guiding principles (**Table 28**) and suggestions for product development priorities identified below. The overall approach is aimed at connecting with provincial Product Development Priorities identified in **Table 29**.

Table 28: Guiding Principles for Product Recommendations for SJRV

- Highlight the **unique** natural and cultural features and opportunities for cultural tourism offered by the region.
- Coordinate the provision of community based natural and cultural tourism using **existing resources**.
- Assemble new products and experiences – from existing cultural resources – that offer **authentic** and **experiential** components that will attract cultural tourists.
- Deliver a **distinctive** and **authentic** St. John River Valley natural and cultural tourism experience that differentiates the region from others.
- Encourage community-based sustainable development that promotes environmental consciousness and river access.

9.2 Provincial Product Development Priorities and Emerging Products

Wherever possible, the strategy outlined below has attempted to tie into the Provincial tourism development priorities⁸, most notably in the areas of:

1. **Experiences:**
 - a) **Natural Wonders:** wildlife viewing, boat tours, canoeing and kayaking, snowmobiling, cycling, outfitters diversification, covered bridges, and fishing.
 - b) **Heritage and Culture:** festivals and events, heritage and culture products, local architecture.
2. **Infrastructure**
 - a) Accommodations
 - b) Attractions: development for municipally-owned and/or operated leading attractions required in all areas of the province.
3. **Developmental Initiatives**
 - a) Seasonality: issue for entire province, but rural areas in particular,
 - b) Market Development: initiatives should be provincial in scope, possibly Atlantic.

⁸ *New Brunswick Tourism Development Guidelines*, Fredericton: New Brunswick Department of Tourism and Parks, April 2004.

4. Regional Need for Development Identified by TAP¹

The regional need for development identified by TAP includes identification of appropriate governmental agencies to be involve with each development initiative). Specific development priorities are specified for each of 10 areas (**Table 29**).

Table 29: Provincial Tourism Development Priorities for Experiences and Opportunities for the Upper SJRV

Provincial Focus & Top Priorities For Upper SJRV*	Opportunities for Upper SJRV
<p>1. Nature Viewing & Interpretation <i>Audio guide?</i></p>	<ul style="list-style-type: none"> Strengthen geological interpretation and tour availability at the Grand Falls Gorge. Birding ("Avitourism"): species list available from Fallsbrook Centre in 4 languages (\$5); web listing and broader distribution at low cost required. Trees, plants species lists also available.
<p>2. Cycling</p>	<ul style="list-style-type: none"> Ensure the upper sections of the Sentier NB Trail are completed, targeting major national event by 2006. Multi-use trail map for Valley required, showing connections to community trail networks.
<p>3. Festivals and Events:</p>	<ul style="list-style-type: none"> In order to grow, expand and develop, Festival organizers need to be informed of Market Ready criteria and offered seminars on how to "get there". Partnerships with other festivals and events need to be strengthened (connections).
<p>4. Heritage and culture</p>	<ul style="list-style-type: none"> Provide expertise to those wishing to interpret and provide quality animated opportunities (video, story telling, theatre, re-enactment) for visitors; Municipal attention to preservation of built heritage. Assist tourism operators to include heritage/cultural products in packages.
<p>5. Snowmobile</p>	<ul style="list-style-type: none"> Continue to emphasize Upper Valley's role in (and extensions to) the Northern Odyssey trail, provincial trail connections that link to regional and community trails.
<p>6. Covered Bridges and</p>	<ul style="list-style-type: none"> Covered Bridge Tourism Initiative has developed presence local driving tour map; potential links with additional covered bridges in the Valley.
<p>7. Boat Tours</p>	<ul style="list-style-type: none"> Listing of all opportunities along St. John River (see Inventory)
<p>8. Canoeing and Kayaking</p>	<ul style="list-style-type: none"> Incentives required to stimulate businesses that provide River access opportunities (possibly youth) for visitors at River Green sites.
<p>9. Fishing</p>	<ul style="list-style-type: none"> Strengthen options, fishing license availability; encourage Outfitter packages.

* In priority order.

Key product clusters that take shape in the Upper SJRV and fit with the Provincial strategy are noted in **Table 30** along with possible themes for these clusters.

Table 30: Key Product Clusters – Upper SJRV

Possible Themes	Possible Product Clusters
<p>Nature's Wonders Water / River / Outdoors</p> <p>Linking water & land...</p>	<ul style="list-style-type: none"> - Re-discovering the wonder of the Falls & Gorge (similar to <i>Renaissance of The Rocks</i>) - Access to the water and vistas - Outdoor activities (major thrust to increase) - Harnessing the power of water (interpretive tour of dams, falls, etc – GF, Beechwood, and Mactaquac..)
<p>Trails & Tours</p>	<ul style="list-style-type: none"> - NB Trail Pilot Project (value-added trail destination) - Themes around trail/community areas - By-ways & discovery areas along the scenic drive - Links to other areas: Maine / NB,
<p>Culture & Heritage</p>	<ul style="list-style-type: none"> - Studio tours - Festivals & Events - Aboriginal - Living history (& community animation - Interpretation) - Ecomuseum (Upper Valley) - Learning vacations & Elderhostel
<p>Culinary & Agritourism</p>	<ul style="list-style-type: none"> - Field to Plate - Food Production - Special events - Farmers Markets - Fine dining - Culinary delights through the B&B's and interpretation
<p>River Valley in Bloom (and nature discovery)</p>	<ul style="list-style-type: none"> - Botanical gardens - Herbs, medicine - Communities in bloom - Conservation and interpretation (Falls Brook, Tree house, Ducks unlimited, forêt exp) - Tie in CTC Product clubs - Linkages with St-Andrews, Fredericton, etc

9.3 Assessing Upper SJRV Market Readiness

Market readiness assessment tools have been developed for Trails, as well as Attractions, Museums, Parks Experiences, Historic Sites, Public Gardens and can be found in **Appendix J**.

Attractions: The market readiness assessment tool is applied to several specific Upper SJRV attractions (Table J-3), to provide an example of the “scores” for each

1. Purpose and Goal of the Market Readiness Framework.

The original intent of the framework was to guide communities/ private sector operators who wished to develop experiences and services for visitors (e.g. O’Toole’s Gallery in Woodstock).

2. How does this criteria tie in with criteria developed and used by the department?

The idea of developing a market readiness assessment tool was made in the Upper SJRV proposal prior to the development of the Department’s *Market Readiness Criteria Handbook for Tourism Products*⁹. Most of the market ready criteria for key products outlined by TAP¹ is accounted for in the assessment tool.

3. End user of the market readiness assessment tool– who will perform the evaluations? Is this a tool to be left with the Department or will this be completed as an accomplishment of the project?

This is a market readiness assessment tool has the potential to be used by:

- a) communities to develop municipal parks/picnic areas central to the Intercept strategy.
- b) private sector entrepreneurs seeking to open attractions?
- c) TAP to evaluate market readiness and provide a “score sheet” that shows specifically where products need improvement to be “excellent” in terms of market readiness.

4. Suggested product areas to be assessed other than attractions.

If the tool proves useful, it can be modified and completed for each key product category in the Valley identified by TAP (e.g. museums, municipal/local parks, historic sites, public gardens).

Museums	Municipal/local parks
Historic Sites	Public Gardens

⁹ *Market Readiness Criteria Handbook for Tourism Products* (Draft), 2004, Fredericton, New Brunswick Department of Tourism and Parks (March).

9.4 The “River Greens” Community Access Strategy

Key Points

Downtown River Centre or “River Green”: as a focal point for directing “intercepted” visitors into Communities.

Principles: Encourage use of and revitalization of existing municipal infrastructure and stimulate economic spin-offs in Upper SJRV Communities.

Possible Components: Interpretation of Community, History, Key Features; Trail Head Entry; Bike and Boat Rentals.

Community Entry from TCH and River Valley Drive: to create a sense of arrival; consistent and clear municipal welcoming and directional signage.

An example of the “River Green” concept is shown in the following page (Figure 3).

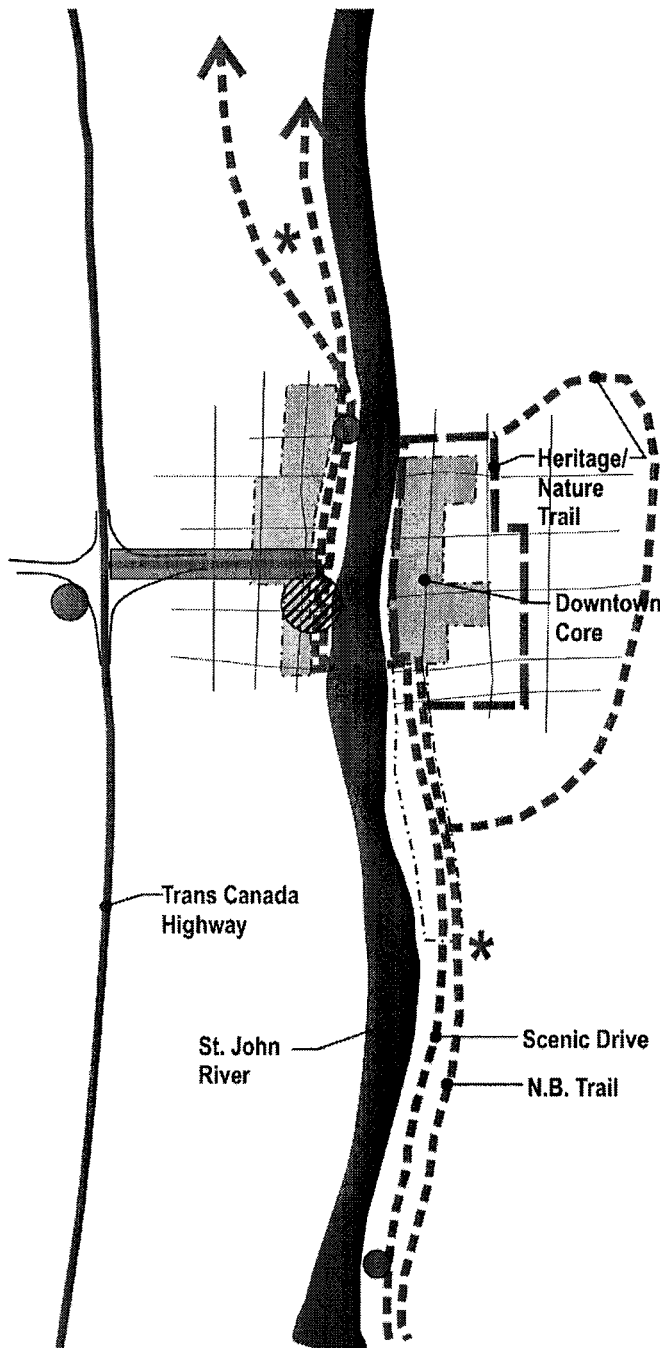
This model serves as a prototype for Community River Greens in the Upper SJRV.

There are several reasons for focusing on Community “River Greens” as a key “stopping point”:

1. There are no Provincially maintained rest areas along the Highway.
2. Almost all SJRV communities have a “River Green” rest/picnic area located on or near the St. John River. Most are municipally operated, with varying degrees of amenities. Almost all have a rest room.
3. River Greens are located in central parts of the community, permitting visitors to stop in a pretty setting along the River and, while stopped, possibly visit local shops and services, contributing to the economic impact of the community.
4. Many River Greens are located at community trail heads, offering opportunities for walkers, hikers and cyclists to “stay a little longer” and take advantage of the Trail.
5. River Greens offer opportunities for additional “surface” interpretation, where the: 1. local area, 2. trails and, 3. area’s key features can be identified on a large, protected map that visitors can take in while stopped.

Plans for each River Green needs to be linked to an Overall Interpretive Plan (long-term) for the Valley.

Figure 3: Model of Community "River Green" Area



● **Scenic Drive Picnic / Viewing Area**

Signage

- Exterior Freestanding Signage
 - Maps (Natural & Cultural Interpretation)
 - Directional Signage

● **T.C.H. Big Stop Visitor Information**

- Provide exterior signage at picnic area (same as Scenic Drive picnic area)
- Interior Information Space
 - Local / Regional Maps
 - Photos
 - Brochures
 - Direct to Downtown / River Centre
 - Local Products

● **Downtown / River Centre**

Principles

- Locate in Downtown to maximize economic spin-off.
- Locate in proximity to River and Trail System
- Provide for flexible and all season use.

Components

- Interpretive space (natural and cultural)
- Community use (off season)
- Water / land trail tours
- Arts / crafts display spaces
- Environmental education / monitoring

* **Community Scenic Drive Entry**

- Provide entry and directional signage
- Provide greening of road corridor
- Protect viewsheds
- Protect historic quality

■ **Community Entry From TCH**

- Provide entry and directional signage
- Provide greening of road corridor

COMMUNITY TOURISM CONCEPT

UPPER ST JOHN RIVER VALLEY PROJECT

10. RECOMMENDATIONS

10.1 Overall

1. **CO-ORDINATING COMMITTEE:** Form a 7-member Coordinating Committee to Oversee the Implementation of the Plan (small Professional group).
Committee Makeup: Urban Hubs and Integrating Mechanism, including: Office du Tourisme Edmundston-Madawaska, 2. Grand Falls Gorge Commission, 3. Woodstock representative, 4. Fredericton Tourism, 5. Tourism Saint John, 6. New Brunswick TAP, and 7. St. John River Valley Tourism Association (SJRVTa).

Implementation Plan

Step 1

Form Coordinating Committee to represent the entire St John River Valley to guide and oversee development of this strategic tourism development plan, identify resources and serve as a liaison to key hubs in the Upper SJRV. TAP to initiate this process.

Step 2

Ensure community “buy-in” for brand/theme established by research (conducted in Summer 2004) and integrate into 2005 Travel Guide.

Step 3

Circulate vision, goals, and action plan for next 3-5 years. Ensure strategy and positioning are accepted by Stakeholders, then theme and logo and branding proposition (Stakeholders include: communities, governments, individual operators.

Step 4

Invite all stakeholder organizations to participate in strategy. Form “Ad Hoc” committees to undertake tasks at hand -- formed for the purpose of implementing this strategy (i.e. local tourism associations, B&B associations, loose partnerships, attractions etc.)

Step 5

Proceed with activities outlined in “Implementation Timeline”. Create Subcommittees to pursue priority areas (noted below). Ensure that new infrastructure developments, new products, experiences and services follow the brand proposition and are in tune with the overall strategy.

2. **CHAMPION:** Consider bringing in a “Champion” to spearhead the Initiative for a 3-5 year term, someone who can bring fresh ideas, energy and focus to the plan along with the drive to put the plan in motion. This person should have an understanding for tourism and be someone highly respected in the Valley and Province who can act as a spokesperson for the Valley and lobby appropriately. **THIS STEP IS A KEY ONE IN SUCCESSFUL COMMUNITY ECONOMIC DEVELOPMENT.**
Rationale: While the Coordinating Committee has tourism expertise, someone must be dedicated to pushing the plan forward.
Estimated Cost: n/a
Timeframe: Immediate – Fall 2004
Responsibility: Coordinating Committee.

10. Recommendations

3. **BILINGUAL GATEWAY TO ATLANTIC CANADA:** Clearly position the northern Provincial entrance point as the *Bilingual Gateway to the Maritimes/Atlantic Canada. Your vacation starts here!* -- with a choice of two routes – River Valley Scenic Drive or Acadian Coastal Drive.
Rationale: The bilingual Gateway concept needs to be reinforced and linked to the relevant scenic drive John River Valley then extended to a value-added experience to visitors entering the province.
Responsibility: TAP
Timeframe: 2005
4. **POSITION THE SJRV AS A SUPERB TOURING DESTINATION with CORRESPONDING TOURING DISCOVERY LOOPS:** Reinforce the River Valley Scenic Drive and ensure that suggested “Touring Discovery Loops” are positioned, profiled and included on maps created for the Region. Includes: 1. *Haut Madawaska Touring*; 2. *Falls and Rivers*; 3. *Farms and Villages*; 4. *Potato Farmlands*; 5. *Covered Bridges*; 6. *Sunset*; 7. *Historic Waterway*.
Once established, explore GPS mapping of Touring Discovery Loops.
Rationale: New Brunswick’s biggest external markets are the Ontario and Quebec touring markets that are interested in nature and culture. These markets are the ones the Region needs to intercept and provide compelling reasons to visit. Reinforcement of the River Valley Scenic Drive and the Touring Loops are a way of ensuring that travelers seeking to “take the River Road” and “get off the beaten track” have opportunities to explore the Valley.
Estimated Cost: n/a
Responsibility: SJRVTA, Coordinating Committee, TAP.
Timeframe: Positioning and distribution in 2005
5. **ADOPT BENCHMARKS:** Adopt benchmarks to assess tourism development success. Circulate to each Urban Hub and other key organizations to be collected and reported on annually. (See *Appendix N* for suggested benchmarks).
Rationale: It is critical to monitor whether tourism development initiatives are successful in the long term.
Responsibility: Coordinated by Coordinating Committee; data collected by individual Urban Hubs and key organizations.
Timeframe: Immediate and Ongoing – for first reporting in Winter 2005.

10.2 Marketing Recommendations

6. **MARKETING TASK FORCE:** Form a marketing task force to oversee the “new” marketing efforts for the Upper SJRV and report to the Coordinating Committee. Ensure that members have appropriate marketing and sales expertise
Rationale: It must be recognized that marketing efforts need focus, direction, expertise and funds. Both stakeholders and industry must be prepared to invest both time and dollars.
Responsibility: Coordinating committee and TAP to initiate formation of Marketing Task Force.
Timeframe: Fall 2004
7. **PURSUE KEY TARGET MARKETS:**
 - a) Pursue PRIMARY and SECONDARY priority target markets identified in **Section 6.4**. Wherever possible, tie in to the Provincial strategy for consumer and travel trade markets. Pursue DEVELOPMENTAL markets slowly, one-at-a-time, based on priority markets identified.
Rationale: Presented in *Appendix F* for each relevant market.
Responsibility: Valley hubs and marketing organizations with expertise, guidance provided by TAP. Coordinating Committee to act as information conduit.
Timeframe: Comments Fall 2004 – Ongoing.

10. Recommendations

- b) **Travel Trade Markets:** Target the travel trade to increase Motorcoach, group and FIT visitation.
- Tactics:**
1. Work closely with the TAP sales team.
 2. Ensure there are unique, authentic products for the trade and that these are continually developed.
 7. Encourage operators to become Trade Smart.
 8. Ensure that TAP sales team and Valley operators are familiar with Inventory.
 9. As appropriate, attend strategic market places.
 10. Participate in TAP FAM (familiarization) tours.
 11. Make sales calls to strategic tour operators (May-October potential).

- c) **Develop the Regional Small Meetings and Conferences:** The Accommodations sector and urban hubs should take the lead in further developing this market.

- Tactics:**
1. Investigate involvement with Meetings New Brunswick group.
 2. Develop marketing and conference sales collateral.

- d) **Promote Snowmobiling for Winter Travel.**

- Tactics:**
1. Ensure market-ready trails and map designating this.
 2. Consider participation in snowmobile consumer shows.
 3. Promote to snowmobile clubs in adjacent Maine, Quebec and Southern NB.
 4. Educate individual groups with potential to promote and sell Upper SJRV.
 5. Train staff at strategic VICS and TAP call centre staff of Upper SJRV.
 6. Meet with marketing and sales staff to explore possible synergies.

8. **INTERCEPT TRAVELERS:** Intercept travelers on the Trans Canada Highway (TCH) traveling to New Brunswick or the Maritimes on a touring vacation. Use a multi-faceted "Intercept" approach to drive business off the highway, into the Big Stops, new gas stations and VICS. The strategy involves enticing travelers "off the beaten track" to the "old River Road" to experience the "real" New Brunswick – from a Valley perspective. **The multi-faceted Intercept approach has many layers and includes:**

a) Pre-Visit

1. Valley website development and linkages to Communities and the Provincial website.
2. Profiling the Valley in the Provincial Guide.

b) En-Route and On-Site

Signage, poster and brochure distribution at TCH-based service stations, Big Stops and VICS/

- Tactics:**
1. Signage (as noted in the report).
 2. Educate locals to promote and sell Upper SJRV experiences and services.
 3. Develop and deliver on the Upper SJRV theme with all active communities through themed signage.
 4. Work with attractions, accommodations, services etc. to develop cross promotion efforts.
 5. Develop an Upper SJRV brochure for distribution at VICS, local businesses, attractions etc.
 6. Consider a "value" or "incentive" approach (not a discount, but an approach for slow times) to motivate travelers to come and stay and test a brochure with offers.
 7. Suggest a display stand, perhaps buttons for front line staff that would say "Ask Me About Great Values on the Upper SJRV".
 8. Investigate 411-telephone pilot being investigated by DOT travelers' information.
 9. Pursue partner for welcome to the Upper SJRV billboard (local connections).
 10. Develop template for signage to promote brand but allow for community sell.

Rationale: Presented in Section 6.5.2. The intent is to direct visitors into "River Green" areas of communities on the St. John River with the goal of yielding the most economic spin-off. Every town and village has a centrally located picnic area.

Responsibility: TAP to coordinate; supported by Coordinating Committee and Municipalities.

Timeframe: Begin Fall 2004 – Ongoing.

9. DEFINE POSITIONING and FINALIZE BRAND: Develop positioning to differentiate the Upper SJRV for markets in New Brunswick, the Region and Eastern Canada – with a focus on the River Valley.

- Tactics:**
1. Create a theme;
 2. Obtain appropriate visuals (primary & secondary).
 3. Develop key copy points to support theme.
 4. Develop creative elements.
 5. Test theme and visuals.

Rationale: The Valley lacks a position, image and brand in the market place.

Responsibility: TAP

Timeframe: Completion by Fall 2004

10. DEVELOP and IMPLEMENT UPPER SJRV BRAND: Develop and implement Upper SJRV branding (bear in mind the need for branding of the Valley as a whole). The Process:

1. Begin with the positioning statement.
2. Develop theme lines to be tested (see below).
3. Develop a creative concept.
4. Identify and obtain primary icon visual for the Upper SJRV, as well as secondary images to be used.
5. Develop key copy points and statements to support the positioning statement and the brand.
6. Develop a locator map with NB, with Eastern US < Canada and for actual Valley.

In light of feedback from the Communities and Province, the following themes are recommended for testing during the summer of 2004.

<i>The Grand River of Canada's East Coast</i>	<i>Grand and Ancient Waterway to the Sea</i>
<i>Eastern Canada's Grand River Valley</i>	<i>Magnificent (Majestic) Riverway to the Sea</i>
<i>Majestic Waterway of Atlantic Canada</i>	<i>River Valley of Grand Discoveries</i>
<i>A Beautiful Stretch of History</i>	<i>The St. John River... Majestic Waterway to the Sea</i>

Rationale: Community workshops reinforced that these are most appropriate to test.

Responsibility: TAP

Timeframe: Fall 2004

11. IMPROVE UPPER SJRV PROFILE: Improve profile of Upper SJRV in provincial publication and website (all seasons).

- Tactics:**
1. Work with TAP to utilize positioning, creative, visuals etc.
 2. Improve listings for Upper SJRV in all seasons.
-Note: Ensure that communities respond to TAP requests for information and that profiles are completed.
 3. Increase packages (all seasons).
 4. Develop themed itineraries for use on the web.
 5. Advertising in TAP print and on-line publications.

Rationale: this represents a large distribution to qualified audiences in strategic markets.

Responsibility: TAP and Upper SJRV Communities, marketers.

Timeframe: Fall 2004, Ongoing.

12. EMPLOY TRAVEL MEDIA: Utilize the travel media to promote the Upper SJRV (includes local and provincial media).

- Tactics:**
1. Develop story ideas for media outside of NB and provide to TAP.
 2. Implement a "working with travel media" workshop.
 3. Work closely with TAP media relations team for media tours.

Rationale: Media are an effective and affordable tool for niche, special interest markets.

10. Recommendations

Responsibility: Marketing Committee, SJRV Tourism Association, Communities, TAP.

Timeframe: Begin Fall 2004; Ongoing.

13. WEBSITE USE: Utilize the web to promote the Upper SJRV.

- Tactics:**
1. Develop a web site and ensure search engine optimization.
 2. Link to the provincial TAP and local community websites.
 3. Develop themed itineraries to have on the web. (NOTE STRONG FALL COLOUR)
 4. Investigate development of e-mail database to be able to promote to consumers what is new, special value offers etc. Note: There is need to be cognizant about privacy laws.

Rationale: Consumers are increasingly searching for information on the web

Responsibility: Marketing Committee, SJRV Tourism Association, Communities, TAP.

Timeframe: Begin Winter 2005; Ongoing.

14. PARTICIPATE IN COOPERATIVE MARKETING PROGRAMS: Maximize exposure through participation in Regional and Provincial cooperative marketing programs to create awareness and knowledge of Upper SJRV before consumers begin their travels as well as en route while in the Valley.

- Tactics:**
1. Each fall TAP offers industry an opportunity to buy into marketing programs. Ensure participation based on priority markets. Ensure that operators are aware of and actively cross-promote area attractions, and visa-versa on-site.

Rationale: Cooperative marketing offers more value, coverage and distribution for towns, villages and individual operators.

Responsibility: Municipalities, SJRV Tourism Association in partnership with TAP and Region.

Timeframe: Begin Fall 2004; Ongoing.

15. DISTRIBUTION: Strengthen the current distribution system for *Provincial Travel Publications and Online* and Maps to include newly established, large gas stations along the new route,

Rationale: Information must be available to consumers before they leave home and supported by information en route.

Responsibility: TAP

Timeframe: Winter 2005.

10.3 Product Recommendations

16. EXISTING DEMAND GENERATORS: Strengthen key demand generators. Use the market ready assessment tool in Appendix J to identify strengths and weaknesses for Attractions.

Rationale: There is need to build on and enhance existing top attractions.

Responsibility: Individual attractions in consultation with TAP

Timeframe: Winter 2005 and ongoing

- a) **FALL FOLIAGE & SPRING SUGARBUSH:** Autumn for fall foliage is a strong Motorcoach season; can be lengthened with additional value-added experiences. Continue to feature autumn colours along the River as a key fall product., targeted at both consumers and the travel trade. Two of the largest maple syrup producers in NB (one organic) are located 5 minutes from the River Valley Scenic Drive. One season can be used to promote and reinforce the opposite season's product.

10. Recommendations

- b) **POTATO INTERPRETATION:** The potato theme should be apparent when visitors drive through the Valley. The opening of Potato World in 2004 should strengthen this theme. Potato connections and links need to be made to connected festivals (including those on the Maine side of the River), potato production (McCain's, Humpty Dumpty) with emphasis on interpretation and culinary tourism (different and new ways of serving potatoes). The Coordinating Committee should initiate discussions with the NB Department of Agriculture and link to farmers in the region to explore partnership development opportunities. Potato farming is dominant throughout the Valley. There are over 56 varieties of potatoes grown in the Valley, with several festivals planned around this theme.
 - c) **LE JARDIN BOTANIQUE** Profile and promote addition of the Mosaiculture Exhibit (8 giant plant mosaics) in 2005 and 2006 to create awareness in touring and local markets.
 - d) **GRAND FALLS GORGE:** Feature the Grand Falls Gorge the Signature Nature Attraction in the Valley. Strengthen the offering for the Motorcoach market, including geological interpretation, tours and parking. Highest visitation in Valley; underused, undersold.
 - e) **HARTLAND COVERED BRIDGE:** High visitation; 20 minute length of stay; needs critical mass of activities/experiences to lengthen stay. Develop additional things to do (e.g. dinner theatre, restaurant). Display and feature local products (e.g. art) for sale around the Bridge and Waterfront weekly to cross promote Paint-the-Hartland. Develop and distribute self-guided itineraries to lengthen visitor stays.
 - f) **KINGS LANDING:** Sustainable funding strategy underway; highlight strong education and seasonal cuisine programs.
 - g) **KINGSWOOD PARK/THE LYNX:** Strengthen the profile Kingswood Park/The Lynx (Fredericton) as a major "Must See" attraction. The Lynx was rated the "best new golf course" in Canada and draws high yield travelers to the area. Kingswood Park is a family-fun attraction and is the largest facility of its kind in the Maritimes.
 - g) **DAMS:** Partner with NB Power to begin a pilot project to develop interpretive for tour programs at dams on the River and charge a fee for tours. Tie the Beechwood tour to the on-site Arboretum. Link each to other dams on River and in the long term consider passes ("passports") to all three dams with a reduced costs. Dam access strengthens River exposure, access and offerings. The three dams (Mactaquac, Beechwood, Grand Falls) all gave free tours in the past, which became to expensive to operate. With scheduled tours and prices attached, these experiences can be reintroduced. Dams in the USA are typically open for tours, with a cost attached (\$5-15 US).
 - h) **HISTORIC GARRISON DISTRICT:** Continue to promote this key downtown draw for Fredericton; serves as a strong hub for other experiences, activities and places outside of the City.
 - i) **KEY FESTIVALS:** Continue to grow major festivals such as La Foire Brayonne (Edmundston); Fredericton Jazz and Blues Festival. Consider a major event in August, Fall or Spring when there currently is none.
17. **RIVER GREENS:** Support the *River Greens Community Access* strategy mapped out in Section 9.4.
- Rationale:** The River Greens strategy is one method of "driving" consumers to strategic points in the community that will permit economic spin-off and awareness of the River, its towns, villages, trails and unique stories.
- Responsibility:** Municipalities, supported financially by RDC and ACOA and with expertise from TAP.
- Timeframe:** Immediate and Ongoing.

18. TRAILS:

- a) Place more of a focus on developing and promoting the Trail System.
- b) Work with the NB Trail and Trans Canada Trail Foundation to obtain a NB Trail Map for the province. While these are a work in progress, future trails can be documented. Since Atlantic Canada is already mapped, these Guidebooks (\$24.95) and Maps (\$5.95) need to be made more widely available. Printed versions of various sections noting grades, distances and degree of market readiness and distribute along Valley at Gas Stations, VIC's, Municipal Offices. Valley residents and travelers are unaware of specific features and distances and the ability to bike from Grand Falls to Saint John.

Rationale: Boomers are healthy and more active and enjoy viewing nature and wildlife along nature trails (ETC Feb 2004) The development of the New Brunswick Trails system will attract visitors and intercept the ones who want to view our River system

Responsibility: NB Trails Council in Partnership and with guidance from TAP, Coordinating Committee, SJRV and City Hubs; SJVTA and Distribution outlets.

Timeframe: Alternative to Edmundston-Grand Falls mapped out prior to 2006 Cycling Event; finish by 2010. Trail maps for initial availability in 2005

19. CYCLING EVENT: Consider holding a major bicycle race event, with major sponsors, drawing participants from across Canada in order to draw attention to the Valley.

Rationale: Lack of awareness of the Valley and broad participation in biking. Most avid cyclist will go up to 45 kms per day.

Responsibility: SJRVTA, Office du Tourism d'Edmundston, Tourism Fredericton, NB Trails Council.

Timeframe: Target 2006

20. EVENT CALENDAR: Develop a Valley Tourism Event Calendar for on-line and print distribution throughout the Valley.

Rationale: Events can be bundled together to attract visitors to the region. An annual event calendar in every accommodation unit can contribute to increasing length of stay.

Responsibility: SJRVTA to take the lead; DMO's, City Hubs, event organizers, N.B. Heritage Branch, CEDA's

Estimated Cost: \$10,000 paid for by advertisers

Time Frame: Immediate (2005)

21. "ECOMUSEUM": Use the existing Museum Zones and consider creating a St. John River Valley Ecomuseum, combining existing heritage sites under one concept..

Rationale: This broadened notion of an "ecomuseum" serves the function of grouping demand supporters to create a "new" demand generator. The ecomuseum concept (originated in France, implemented in Quebec), is particularly relevant to the Valley with its geographically dispersed heritage assets. An ecomuseum would interpret the Valley as it is, providing residents and visitors with a means to discover, appreciate, experience and celebrate the unique culture of the region.

Estimated Cost: Funding for planning and coordination through MAP (Canadian Heritage) and other outside sources. Participating museums contribute development fee.

Responsibility: Partnership of Museum Zones, heritage sites, AMNB, N.B. Heritage Branch

Timeframe: Long term: 2005-2010.

22. SCENIC LOOKOUTS: Develop plans for the re-design of existing scenic lookouts (i.e.

Charley Lake) to include definition of access and parking, landscaping, picnic / seating, interpretive signage, recycling bins, etc. Locate and develop plans for new scenic lookouts along the Scenic Drive. Partner with DOT and N.B. Power to use existing land.

Rationale: Lookouts serve as another intercept point where additional information can be obtained on the Valley.

Responsibility: TAP, SJRVTA in partnership with NB Power and DOT.

Timeframe: Begin 2005; target one yearly to 2010.

- 23. RIVER PRODUCTS & PRODUCT DELIVERY TRAINING:** Set up a **pilot training project** aimed at providing an incentive to develop cultural and soft adventure touring tourism businesses along the St. John River in order to provide better access to the River.
Rationale: Encourage tourism businesses that cater to “River Access and Interpretation.”
Responsibility: Partnership: TAP, RDC, CEDAs and HRDC to initiate discussions with post secondary institutions in New Brunswick (NBCC, UNB, UdeM) to initiate a pilot project.. Include: Heritage sites, Museum Zones, AMNB, N.B. Heritage Branch in discussions.
Timeframe: Begin 2006; Delivery in Winters; Ongoing.
- 24. STUDIO MAP, STUDIO ROUTE, STUDIO OPEN DAYS:** Develop a Valley studio map/PASSPORT, that includes route (with artists and crafters identified) and an identified MONTH of studio “open dayss” for those not typically open (e.g. during the spring and/or fall) and offers visitors a chance to win one of the works produced by an artist (e.g. draw).
Rationale: Proposed Studio Map creates an arts and crafts route. The Studio Open Days provide a focal event and tie in with the proposed event tourism strategy. There is possibility to strengthen the international cultural heritage route, which has been mapped out.
Responsibility: Spearheaded by Champion from Arts/Crafts community in the Valley, supported by expertise and finances from Valley artists, Arts & Crafts Council, N.B. Culture and Sport Secretariat, N.B. Heritage Branch, N.B. Tourism & Parks, CEDA’s. Supported by the Quebec Labrador Foundation and the Maine Arts Council in their efforts to establish an International Cultural Heritage Route, as such a route will have positive impacts (both social and economic) for both New Brunswick and Maine..
Timeframe: Initiate in 2004 for Implementation in 2005 and Ongoing.
- 25. SPECIES LISTS:** Work with the Falls Brook Centre to reproduce species lists (indigenous birds, plants, animals) and provide on line and at key distribution outlets for sale (at a nominal fee) to travelers.
Rationale: This is an inexpensive, cost-recovery means of nature lovers and naturalists visiting the area. The list is an informal way of communicating New Brunswick’s cultural dimensions since Falls Brook species lists are presented in four languages (Maliseet, MicMac, French and English).
Responsibility: Coordinating Committee in partnership with Fallsbrook Centre and TAP to provide expertise.
Timeframe: For distribution at VICs for 2005.
- 26. SCENIC DRIVE LANDSCAPE MANAGEMENT PLAN:** Develop a landscape management plan for the Scenic Drive corridor (i.e. tree removal or trimming to preserve or enhance views, screen views, mowing guidelines, etc). Include a review of existing Provincial Government policies regarding the construction and restoration of quarry operations to establish new guidelines (i.e. environmental and aesthetic). (esp. near Grand Falls).
Rationale: Coincides with the current application for Heritage River Status by the St. John River Society.
Responsibility: Coordinating committee to initiate partnership
Timeframe: Long-term; 2005-2010.
- 27. POST SECONDARY EDUCATION INSTITUTIONS:** Feature/showcase post secondary institutions such as UNB, UdeM and NBCC, as attractions in and of their own right.
Rationale: These sites offer touring, architectural and learning experiences that can be featured in promotional material.
Responsibility: Individual municipalities, educational institutions and TAP.
Timeframe: 2005 – Ongoing.

10.4 Packaging-Related

- 28. CHARACTER INNS & B&B PACKAGES:** Consider packaging character Inns and Bed and Breakfasts within the Provincial Getaways. Explore a web link from the Provincial site and a photo in their Travel Guide listing. Promote as a clustered alternative accommodation offering.
Rationale: There are several heritage Inns and B&Bs in the Urban Hubs and Valley that, when grouped, form a product.
Responsibility: TAP to initiate; Regional Tourism Associations to assist.
Timeframe: Explore during winter 2005.
- 29. SELF-GUIDED ITINERARIES:**
- Each Urban Hub should develop 2-3 self-guided itineraries per year
 - Itineraries should be distributed at local VICs, Town Halls, Gas stations.
- Rationale:** people need help in putting these itineraries together
Cost: Minimal - cost of photocopying and distribution. This cost could be shared with the suppliers listed on the self-guided itinerary.
Responsibility: Individual tourist offices e.g. Edmundston Tourism, Woodstock Tourism
Timeframe: 2-3 new self-guided itineraries per year for Valley, commencing in 2005 -- to add to the bank of things to see and do.
- 30. TRAVEL LEARN PACKAGES:** Develop at least one Travel Learn itinerary per year; these can then be adapted to a broader market (see **Appendix L**).
Rationale: Trend - small groups, spend a lot; products developed here pave the way for broad consumer market product development.
Responsibility: TAP in partnership with suppliers in the River Valley and a receptive operator.
Timeframe: Begin for 2005 –
- 31. BUILDING PACKAGES” WORKSHOP:** Develop a highly interactive Packaging seminar that facilitates networking and partnerships with tourism operators and non-traditional suppliers. The workshop should offer opportunities for networking and package development “on the spot” and be held mid Valley or at several locations to permit broad participation. One focus could be on catering to small and/or large group.
Rationale: There limited packaging with other partners, largely due to lack of knowledge of what is available and lack of opportunity to network with other stakeholders.
Responsibility: TAP, perhaps in partnership with TIANB and/or private delivery firm.
Cost: Participants should bear some of the cost. Could be developed/delivered in conjunction with *Taps Professional Development Program* currently in design stage.
Timeframe: Short term (Late Fall 2004 or Winter 2005) to be ready for the upcoming season.
- 32. PROVINCIAL PUBLICATIONS:** ~~Seek a less expensive alternative for smaller operators to package cooperatively and enable them to be present in the Travel Guide.~~
Rationale: Smaller operators express concern over inability to afford current advertising rates. When they do not participate, unfortunately the overall tourism product is diminished.
Responsibility: TAP
Timeframe: Fall 2004.

10.5 Traveler Services

- 33. PROVINCIAL VISITOR INFORMATION CENTRE (VIC):** Explore moving the northern Provincial VIC to the St. Jacques Exit (#8) where a new full-service gas station is planned.
Rationale: Current VIC is difficult to see and not located near services of any kind. Exit 8 provides access to a “Must See” attraction (Le Jardin) in addition to other traveler services (accommodations and restaurants).
Responsibility: TAP to initiate.
Timeframe: Explore Winter 2005
- 34. SIGNAGE:**
- a) HIGHWAY:** Continue to pursue/lobby for the addition of eight (8) “River Valley Scenic Drive” signs, as suggested in the report (ideally 4 signs on each side of the highway).
Rationale: These signs provide visitors unfamiliar with the Scenic Drive to see that there are opportunities for getting on and off. About half are first time visitors who may not take advantage of the Drive on the first visit but might on subsequent returns. Valley tourism stakeholders are adamant that Scenic Drive signage is required. The new highway will bypass nine major accommodation operators.
Estimated Cost: \$12,000/sign
Responsibility: coordinated by “Signage Sub-committee” of Coordinating Committee.
 – Lobby group working in partnership with TAP and DOT; partnership funding from DOT, RDA and municipalities.
Timeframe: Short term (2005)
- b) VICs, Big Stops, Gas Stations:** Produce several large format maps (4'x6', laminated) of the entire River Valley and place these on prominently displayed easels or walls in VICs and Big Stops throughout the Valley. Replicate smaller versions of these (11"x17", laminated) for placement in rest room stalls to reinforce the message. Accompanying/matching 8.5"x11" handouts might list exits numbers, noting “River Greens” and attractions off each exit.
Rationale: The sheer size of the maps will entice visitors to look and is reinforced by an image in the restroom as well as a handout.
Estimated Cost: Design: \$5000; \$500/laminated large sign; \$50/laminated small sign; Valley map handout: \$15,000/100,000
Timeframe: Short term (2005)
Responsibility: TAP to coordinate with input from Coordinating Committee.
- c) Communities:** Provide coordinated entry signage on the boundary for each community and First Nation Reservation on the Scenic Drive. Ensure that each community erects an entry sign at each key entry point, ideally, adopting a similar format with a tag line stating (example): “... Another St. John River Valley Community...” to reinforce the destination message. Ensure “River Greens” have appropriate DOT signage.
Rationale: Entry points require attention. Communities are eligible for “Welcome To” signs under the existing DOT rules.
Estimated Cost: \$2,000/DOT sign
Responsibility: Municipalities, coordinated by “Signage Sub-committee” of Coordinating Committee.
Timeframe: Ongoing – target completion for 2008.
- 35. OFF-PEAK VISITOR INFORMATION:** Position Town & Village Offices as Information Centres for the off-peak season
Rationale: Ensures that visitors can have access to information year-round.

Estimated Cost: Coordination.

Responsibility: Individual Municipalities; organized by Coordinating Committee.

Timeframe: Fall 2004 and ongoing.

10.6 Communities

36. COMMUNITY EXPERTS INVENTORY: Each community needs to do an inventory of the "expertise" in their community and willingness of "experts" to share their skills and stories with tourists (and locals) at pre-arranged times. Communities have geologists, astronomers, storytellers, doctors, gardeners etc.

Rationale: These "hidden" tourism resource people offer the potential to develop experience-based activities for EACH community. Activities can be highlighted on community events schedules...

Estimated Cost: Time and municipal support.

Responsibility: Volunteer in each Community; Coordinating Committee might assign Task Force for this Task.

Time Frame: Short term (2005)

37. VALLEY AMBASSADOR PROGRAM: Explore development of a *Valley Ambassador Program* aimed at educating locals about tourism and encouraging them to volunteer and:

- Provide the names of visiting friends and relatives (perhaps using a Contest) so that information packages can be targeted at these visitors.
- Develop a tourism education program aimed at elementary students. Work with retired teachers, TIANB and the Canadian Tourism Human Resource Council a (CTHRC) to build on existing programs.

Rationale: The repeat visitor market is strong which suggests local connections. Over 25% of the Upper SJRV visitor market stays in unpaid accommodation. These friends and relatives are in a position to promote available activities and programs if aware of their existence. The *Ambassador Program* is an inexpensive (dollar-wise) way to raise tourism's profile if the right volunteer-leader can be found.

Responsibility: Education Task force – of the Coordinating Committee to Coordinate – with Volunteer from each Community.

Timeframe: Ambassador Program, 2006; Elementary School Education Program, 2007

38. COMMUNITY UNIQUENESS, BUILT & NATURAL HERITAGE & INTERPRETATION: Each community must identify something unique or authentic to that community. Communities need to work to recognize and enhance the built heritage/historic cores and main streets. Moreover, natural features need to be interpreted and the environment protected and preserved (For community unique features see **Appendix B, Table B-3**). (Tied to Recommendation #37).

Rationale: The communities appear to be missing the authentic interactive aspect to make them come to life. A series of static, historic style presentations will NOT work.

Many communities need revitalization and evidence of community pride. Retail facades often in need of aesthetic improvement.

Responsibility: Each municipality in partnership with the Historic Places Initiative (Heritage Branch); NB Department of the Environment.

Timeframe: 2005-06

39. FIRST NATIONS COMMUNITIES:

- a) In order develop an interconnected tourism plan for the entire river valley, First Nation bands must also communicate with each other.
- b) Communities must work with individual First Nation Bands in respective areas.

10. Recommendations

- c) Each individual First Nation Band is in a position to provide River access, a waterfront park and a picnic area, visitor information and interpretation service, a high quality arrival experience, heritage and nature trails, entry and directional signage.
- 40. BEAUTIFY COMMUNITIES:** Communities must attempt to improve facades, green space and beautify downtown areas, parks and River Greens. Built heritage communities should set the stage for these efforts. Consider involvement in Communities in Bloom. Consistent with Recommendation #35, establish a register of historic places of local significance.
Rationale: Many communities need revitalization and evidence of community pride. Retail facades often in need of aesthetic improvement and preservation of historic and natural character needs attention.
Responsibility: Each municipality in partnership with Communities in Bloom, the Historic Places Initiative (Heritage Branch); NB Department of the Environment.
Timeframe: 2005-Ongoing.
- 41. COMMUNITY INTERPRETATION :** Train community heritage and tourism groups to develop product-oriented interpretation of communities through workshops. Encourage certification of Heritage Interpreters.
Rationale: Tourism Industry Association of New Brunswick). Involve Association of Museums New Brunswick and the recently established Central Valley and Madawaska Museum Zones.
Estimated Cost: Groups to sponsor individuals and pay TIANB, AMNB course fees
Responsibility: Municipalities, Heritage Groups, TIANB¹⁰, AMNB¹¹, SJRV Tourism Association
Timeframe: Medium- Long term (2005-2008)
- 42. INDIVIDUAL COMMUNITY INFRASTRUCTURE:** See Individual Community Recommendations found in *Appendix P*.
Rationale: The principles of sustainable development dictate that the improvements and infrastructure required to host visitors also provide opportunities for local residents to experience their nature environment and local culture. Infrastructure improvements are also recommended to provide access to and interpretation of the unique cultural and environmental attributes of the communities and meet the objectives of a number of stakeholders such as the Province, tourism industry, environmental groups and historical societies.
Note: Many of the infrastructure improvements can be achieved through the existing municipal planning process and municipal budgets as part of ongoing municipal capital projects. Infrastructure funding is available for several recommendations. Other projects can be championed by heritage, cultural and environmental groups as part of their ongoing agenda.
- 43. MUNICIPAL PLANNING POLICIES:** Develop municipal planning policies to manage development along the scenic drive within municipal boundaries.
Rationale: Some communities need heritage and or environmental bylaws to ensure that the River resource is not threatened (see recommendations in *Appendix P*).
Responsibility: Individual communities; requires lobbying by SJRTVA.
Timeframe: Ongoing; target 2010 for at least 5 policies to be in place.

¹⁰ Tourism Industry Association of New Brunswick

¹¹ Association of Museums New Brunswick

10.7 Partnerships

44. REGIONAL PARTNERSHIPS: Form strong partnerships with provincial and national government and relevant organizations, specifically the St. John River Society that is currently working to achieve Heritage River Status for the St. John. (See list of potential partners is found in *Appendix O.*)

Rationale: Partnerships facilitate communication and movement. The Regional Tourism Associations have begun to facilitate this process.

Responsibility: Coordinating Committee to take lead role.

Timeframe: Fall 2004 – Ongoing.

45. CEDA ASSISTANCE ROLE: Assist communities with infrastructure funding, applications and expertise where relevant. CEDA Regional Tourism Strategies have been considered and integrated into this report.

Rationale: Many of the recommendations in this report dovetail with Regional Tourism Strategies for each of the CEDAs in the Upper SJRVT (Carleton, Central NB, Fredericton, Grand Falls and Edmundston).

Responsibility: Individual CEDAs, working in partnership with the tourism industry, TAP and other CEDAs

Timeframe: Fall 2004 – Ongoing.

Timeframe: Long-term

11. IMPLEMENTATION TIMELINE

The Implementation Timetable for Recommendations is shown below in **Table 31**.

Table 31: Implementation Timetable

	Recommendation	Priority	2004	2005	2006	2007	2008
	OVERALL	H=High; M=Medium; L=Low					
1	Coordinating Committee	H	----->	----->	----->	----->Renew	----->
2	Choose Champion	H	X				
3	Bilingual Gateway to Atlantic Canada	H		X			
4	Position as Touring Destination	H		X			
5	Adopt Benchmarks and Measure	H	->	X-	X-	X-	X
	MARKETING						
6	Form Marketing Task Force	H	----->	----->	----->	----->Renew	----->
7	Pursue Target Markets			----->	----->	----->	----->
	a) Primary and Secondary markets	H		----->	----->	----->	----->
	b) Travel Trade Markets	H		----->	----->	----->	----->
	c) Regional Small Meetings/Conferences	H		----->	----->	----->	----->
	d) Snowmobiling for Winter Travel	H		----->	----->	----->	----->
8	Intercept Travelers	H		----->	----->	----->	----->
9	Define Positioning & Finalize Brand	H	X				
10	Develop & Implement Upper SJRV Brand	H	X				
11	Improve Upper SJRV Profile	H	->	----->	----->	----->	----->
12	Employ Travel Media to enhance profile	M	->	----->	----->	----->	----->
13	Use the Web to promote the Upper SJRV	H		----->	----->	----->	----->
14	Participate in Cooperative Marketing Programs	H	->	----->	----->	----->	----->
15	Strengthen Current Travel Publication Distribution System	H		XX			
	PRODUCT						
16	Strengthen Existing Demand Generators	H					
	a) Fall Foliage & Spring Sugar Bush	H		----->	----->	----->	----->
	b) Potato Interpretation	M		->	----->	----->	----->
	c) Le Jardin Botanique	n/a*					
	d) Grand Falls Gorge	n/a					
	e) Hartland Covered Bridge	n/a					
	f) Kings Landing	n/a					
	g) Kingswood Park - The Lynx	n/a					
	h) Historic Garrison District	n/a					
	i) Key Festivals	H	->	----->	----->	----->	----->
	*n/a=responsibility of individual attractions						

Continued...

11. Implementation Timeline

Table 31: Implementation Schedule (Continued)

	Recommendation	Priority	2004	2005	2006	2007	2008
	PRODUCT (cont'd...)						
17	Support & Implement "River Green" Community Access Strategy	H	->	----->	----->	----->	----->
18	a) Trails Focus	M	->	----->	----->X		
	b) Trails Map	M	->	----->X			
19	Cycling Event	M	->	----->	----->X		
20	Event Calendar	H		----->X			
21	EcoMuseum Concept	L		->	----->	----->	----->
22	Scenic Lookouts	M		->X	->X	->X	->X
23	River Product Delivery Training	M			->	X	X
24	Studio Map, Route Open Days	H	->	----->	----->	----->	----->
25	Species Lists	M	->	----->	----->	----->	----->
26	Scenic Drive Landscape Mgmt. Plan	L		->	->X		
27	Feature Post Secondary Education Institutions	M		----->	----->	----->	----->
	PACKAGING-RELATED						
28	Character Inns & B&B Packages	M		X			
29	Self-Guided Itineraries	H		X	X	X	X
30	Develop Travel Learn Packages	L		X	X	X	X
31	"Building Packages" Workshop	M		X	X	X	X
32	Provincial Publications Buy-In for Small Operators	H	X				
	TRAVELER SERVICES						
33	Provincial Visitor Information Centre Exit 8	M		X			
34	Signage						
	a) Highway	H		----->X			
	b) VICs, Big Stops, Gas Stations	H		----->	----->		
	c) Communities	M		----->	----->	----->	----->
35	Off-Peak Visitor Information	H	->	->	->	->	->
	COMMUNITIES						
36	Community Experts Inventory	L		-->	->		
37	Valley Ambassador Program	L			->	----->	----->
38	Community Uniqueness & Interpretation	M		->	->		
39	First Nations Communities	H	->	----->	----->	----->	----->
40	Beautify Communities	H		----->	----->	----->	----->
41	Community Interpretation Training	M		->	----->	----->	----->
42	Individual Community Infrastructure	n/a					
43	Municipal Planning Policies	M		----->	----->	----->	----->
	PARTNERSHIPS						
44	Regional Partnerships	H	->	----->	----->	----->	----->
45	CEDA Assistance Role	H	->	----->	----->	----->	----->
	<i>*n/a=responsibility of individual communities</i>						

12. CONCLUSIONS

This strategic tourism product and market development plan delineates the approach to be used for sustainable tourism in the Upper SJRV and provides the steps to be taken over the next 3-5 year period. The report maps out the strategy to be used in order to increase tourism visitation and revenues to the Valley and provides communities with a road map for how to achieve sustainable tourism product and market development.

The Report suggests new natural and cultural products, themes and clusters the Valley in the recommendations section. In addition, **Appendix L** highlights themed packages and components that are suitable for various markets. Touring routes are also evaluated and themed touring loops are suggested. A **Categorized Tourism Product Inventory** is provided in a separate document.

An applied model for evaluating tourism products has been devised to serve as a prototype for use by attractions and other products/services seeking to improve or create new tourism offerings (*Market Readiness Evaluation Tool, Appendix J*). In addition, individual communities are provided with a road map for improving tourism sustainability and appeal (Recommendations in **Appendix P**).

In terms of the profile and branding of the Upper SJRV, several themes that reflect the unique character of the Upper SJRV are being tested with travelers during the summer of 2004. These themes will form the basis for the Upper SJRV positioning, brand and image. Marketing strategies and tactics are offered in the Recommendations section of the report.

Finally, benchmarks that will assist in measuring sustainable tourism development progress over time are offered in **Appendix N**.

The next steps for the Upper SJRV Initiative are clearly laid out in Recommendations 1 and 2: forming an ad hoc coordinating committee to oversee tourism development and choosing a "Champion" to represent the Valley at a broader level.

It is hoped that in implementing this strategy, the Upper St. John River Valley will sustainably develop tourism over the next 3-5 years and serve as a model for other River Valley communities.

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