

TORBAY

COMPREHENSIVE TOURISM PLAN

F I N A L R E P O R T

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TORBAY COMPREHENSIVE TOURISM PLAN

Final Report - April 2010



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APPENDIX A

Market Assessment and Economic Assessment Tools

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EXECUTIVE SUMMARY

The executive summary of Torbay's Comprehensive Tourism Plan Report is presented as a series of key facts and recommendations that need to be well understood in order to proceed with the plan. The facts are simple, but they govern the approach that Torbay should take in order to recognize its opportunities and limitations, and best develop its assets.

KEY FACT 1: TORBAY'S TOURISM OPPORTUNITIES ARE SMALL, BUT INDEED, THEY EXIST. Most locations and communities think that they are unique. It would be unfair to say that Torbay does not have a unique history, or interesting things that differentiate it from other communities. But it would be non-strategic, and frankly, bad business, to conclude that this means that Torbay is, or has the potential to be, a **unique tourism destination**. Simply put, Torbay's best tourism opportunities are to take advantage of existing tourists who are already coming to the St. John's Central Metropolitan Area, and present interesting active tourism opportunities and packages that could attract them to visit Torbay.

KEY FACT 2: THERE ARE ONLY TWO PRODUCT-MARKET MATCH OPPORTUNITIES. Specifically, in the analysis undertaken for the Town, many products and markets were identified. The products were matched with the markets, and among these product market matches, seven were identified as possibilities for having potential for a moderate Return on Investment (ROI). Among these seven, only two were determined to have reasonable potential for the Town. These two key product market matches are:

- **Out-of-province tourists seeking packages (Moderate ROI)**
- **Out-of-province tourists seeking active nature activities (Moderate ROI)**

KEY FACT 3: BEAUTIFUL TORBAY IS KEY TO PROMOTING THE TOWN, BUT IT IS MORE THAN A THEME OR A MARKETING CONCEPT – IT IS A LIFESTYLE THAT CAN ENERGIZE THE TOWN. The implication of such a view is that all initiatives undertaken by the Town should keep *beauty* at their core – whether that is the development of new physical assets and attractions, signage, streetscapes, centres, or parks.

KEY FACT 4: IN THE WORLD OF TOURISM, PRODUCTS NEED TO BE DEVELOPED BEFORE MARKETS CAN BE ATTRACTED. Many tourism stakeholders are puzzled by the difficulty in determining if a Town should wait to be market ready, or if it should wait for people to come. The 'chicken and egg debate' must be avoided, as it can paralyze a community into doing nothing. Simply put, entrepreneurs won't develop products without a market. The market won't come without a

product. The onus falls to governments to help develop the products, so that the markets will come. Thirteen recommendations have been put forward for product development and marketing direction. They are prioritized in order of importance as keys to success.

The twelve recommendations are:

1. Development of a Visitor Information Centre (VIC) in the Town Centre.
2. Adoption of direction from the Torbay Beautification Plan.
3. Connect directly with Destination St. John's in partnership.
4. Develop niche promotional materials targeting out-of-province visitors already coming to the province.
5. Implement a master plan for the development of the Town Centre as a gateway to the East Coast Trail, as per the Torbay Heritage Plan, and the Town.
6. Further develop simple physical assets that promote tourism, while beautifying the Town in a unique and aesthetically pleasing manner (an execution strategy for the Beautification Plan).
7. Development of a linear park system to link assets, as per the Torbay Recreation Master Plan.
8. Implementation of the Heritage Plan.
9. Park development, particularly coastal parks.
10. Development of water-based activities.
11. Increased usage of Torbay's mascot 'Ollie-T', the Lion from the Sea.
12. Develop a more comprehensive electronic communications strategy.
13. Retain a Tourism Coordinator to support implementing the Tourism Development Strategy.

INVENTORY OF EXISTING BUSINESSES AND TOURISM ASSETS

An inventory of businesses and assets that exist in the Town of Torbay was undertaken. This was necessary to clearly identify availability of products, services and infrastructure that can be consumed and enjoyed by various tourist groups. This detailed listing provides a starting point for the analysis of Torbay's physical assets.

Types of businesses currently exist that are, or might potentially be, engaged in tourism¹:

Tour Operators

- DeeJay Charters, Tapper's Cove (Bill Tapper) – boat tours

Arena (recreational events)

- New Jack Byrne Arena

B&B's

- Gallows Cove Bed and Breakfast
- See The Sea Bed & Breakfast

Museums

- Town Museum: The museum is home to hundreds of artifacts, donated mostly by residents of Torbay. Located in the Town Hall the museum has five new exhibits which opened in October.

Restaurants

- Coady's Eatery
- Mary Brown's
- Atlas Pizza

Website

- www.town.torbay.nf.ca

Physical assets exist that might support Tourism:

Historic Sites

- **Torbay.** The bay itself where the English landed during the seven year's war.

¹ Information derived from www.town.torbay.nf.ca, and www.newfoundlandlabrador.com.

- **Torbay.** A National Historic Site because of the English forces landing in Torbay to take back St. John's from the French ending the Seven Year War. Torbay was named after Torquay, Devonshire, England.
- **Holy Trinity Church.** There have been four churches built on this site since 1830. Each has been named 'Holy Trinity'. The most recent church was built in 1992.
- **St. Nicholas Anglican Church.** First built 177 years ago this church has a long history in Torbay.
- **St. Michael's Convent.** Torbay was once home to St. Michael's Convent - the home of the Congregation of the Sister's of Presentation of the Blessed Virgin Mary. The first convent was opened on October 18, 1865. This building was torn down in 1889 and construction of a new building commenced. The new structure, which was made of wood, stood for 97 years.
- **Tappers Cove (Treasure Cove).** Tappers Cove was once known as Treasure Cove because of its known association with pirate John Nutt. It is also haunted by a black dog and a little boy, relating again to the pirates that buried treasure there.
- **Gallows Cove, which is composed of three smaller coves, Little Gallows Cove, Cows Cove, Herring Cove.** There are a number of stories attached to how Gallows Cove got its name. One is that it is named for the many pirates who met their end at the gallows there. Another is that the residents constructed Gallows there to let mariners know that this was not a community from which to conduct illegal activities.
- **Frenchmen's Ridge.** There are two separate stories attached to how Frenchmen's Ridge got its name. The first is that the residents of Torbay would hide on Frenchmen's Ridge when the French invaded Torbay, which they did on several occasions. The other story is that Frenchmen's Ridge is the location of the first battle between the French and English in 1762. This is supported by the finding of a French cannonball in a marsh close to the ridge.
- **Liddy's Bar.** Famed to be the oldest running drinking establishment in North America.
- **Old St. Nicholas Anglican Cemetery.** Located off Lower Street, near Torbay Beach. This is the oldest known cemetery in Torbay and is a Municipal Heritage Site.
- **Codner House.** A painted, wooden, two storey, single family dwelling built c. 1893. This mansard roof house is a Municipal Heritage Site.

- **Old Holy Trinity Parish Cemetery.** Located off Torbay Road adjacent to St. Michael's Memorial Garden. This graveyard is a Municipal Heritage Site.
- **Prayer Garden.** On the location of St. Michael's Convent. The garden has the Stations of the Cross monuments.
- **War Memorial.** A memorial to the veterans of WWI and WWII.

Scenery

- Sprawling fields and beautiful shoreline.
- View of Atlantic seascape

Father Troy Walking Trail

- The Father Troy trail traverses along the edge of this magnificent coastline, where you can see whales frolicking in the bay, observe icebergs in early summer, or just enjoy the natural beauty of the area. This trail is ideal for both the novice and the expert hiker. For the avid hiker the Father Troy Trail links into the East Coast Trail.

Boating / Fishing / Kayaking

- Not guided.

Special events, stories, or current activities that could support tourism:

- **Hillside Festival.** The festival is a celebration of Torbay's heritage and culture. From boat tours to dinner theatres this week and a half event in July offers a variety of events and activities for everyone.
- **Winterlights Competition.** A national competition promoting community involvement through the enhancement of neighborhoods and public spaces. This four month celebration is complimented by a variety of events throughout the winter. This year some of the events included an evening with Santa Claus Parade, Craft Fairs, Dinners and Dances.

Tourism assets deemed to be market ready:

- Hillside Festival
- Torbay Museum
- East Coast Trail

TORBAY'S UNIQUENESS

In the world of tourism planning, “uniqueness” refers to distinct and proprietary features, benefits and assets that differentiate one particular community from other nearby communities.

Based on original tourism planning for the development of a visual identity for Torbay (i.e. logo and slogan development), the Torbay brand is positioned as “serene and beautiful, possessing rural charm with urban style: Beautiful Torbay”. This positioning and these features are the core elements for the development of identity, and form the foundation of a tourism strategy.

What is apparent from this direction, when comparing it to other communities, is that there are other “competitors” (nearby communities) which possess similar attributes. That is, it is challenging to identify truly unique features and benefits for almost all communities in the province. Torbay’s uncluttered coastline, unlike many other parts of the world, provides a compelling backdrop for the Town, but these features are somewhat similar to other nearby communities. Torbay will have to rely on a strategic and tactical approach to identify the best products/assets that match most appropriately to various visitor target groups.

VISITOR PROFILES AND MOTIVATORS.²

Current visitors, based on tourism survey:

- Of those surveyed, the majority of visitors are between the ages of 36-64, closely followed by ages 19-35, with 45% (female) and 55% (male) ratio.
- Almost 86% of them are residents of Newfoundland and Labrador, with 2 respondents from Ontario, 1 respondent from Alberta, 1 respondent from the United States, and 1 respondent from Germany.
- Approximately half of the respondents were traveling with a partner and/or friends, a third were travelling with children, and the remainder traveling alone.
- Nearly 74% of respondents had already visited Torbay before, with majority of them visiting family and friends. Several respondents returned to visit because they lived there previously, and 1 respondent said they went there for vacation.
- Almost 65% of respondents have visited Torbay more than 4 times. Approximately 22% responded that it was their first visit to Torbay.

Preferred experiences among visitors surveyed:

² Information derived from Tourism Survey

- The number one experience that is preferred is nature activities, followed closely by hiking and visiting friends and family.
- General site seeing and local attractions are also highly preferred, as well as cultural attractions and festivals/special events.
- Over 50% of respondents also indicated that dining is important.
- Educational tours, sporting events, and nightlife were of less importance, but still identified as important by several respondents.

Motivations to stay in Torbay for longer:

- 70% of respondents identified the need for more dining options.
- Nearly half of the respondents identified the need for more accommodations, specialty shopping, and public washrooms.
- Access to local handicrafts, as well as directional signage was also identified as needing improvement.
- One respondent explained that Torbay doesn't offer a comprehensive package of amenities for tourists visiting the area.
- Other respondents identified the need for better/more tourism information, clarifying what's available to do and where/how they can find it in Torbay.

1.0 TRENDS IN TOURISM

An important and potentially influential component of this study related to current trends and potential implications. Trends assessed were: travel intents, tourist needs, and technology. Our case study review confirmed that strategic direction adopted by industry leaders are directly influenced by current trends.

TRAVEL INTERESTS

FROM...	...TOWARDS	IMPLICATIONS
No special interests	Specialized interests and tastes	<ul style="list-style-type: none"> • Most important: Smaller communities may see increases in numbers of tourists with little effort, if they have an interesting product. • Shorter, hassle-free getaway packages are key. • Vacations need to be flexible; traveler control. • Quality service and experience important. • Eco, adventure and outdoor tourism preferred over traditional vacations. • New products needed to meet changing leisure time preferences (i.e. green tourism, spa tourism, health tourism).
Focus on vacations	Focus on getaways	
Destination-oriented	Experience-oriented	
Compromise quality for price	Prepared to spend and expect high quality in return	
Search for sun destinations	Search for exotic and different	
Leisure time as getaway from work/home	Leisure time for personal fulfillment and education	
Interest in man-made attractions	Interest in nature, exploring	
Prepaid, pre-arranged	Traveler in control, menu of options	
City, urban tourism	Rural experiences	

TOURISTS' NEEDS

FROM...	...TOWARDS	IMPLICATIONS
Homogeneous, predictable	Spontaneous, unpredictable, hybrid	<ul style="list-style-type: none"> • Most important: Non-traditional family products appeal to changing family vacation tastes. • Niche marketing to reach specialized market segments.³ • Outdoor/touring/ exploring products and packages to appeal to adventure seekers.
Business professionals, business travel	Active professionals, adventure travel	
Traditional family	Outdoor family explorers	
Empty Nesters	Mature soft adventure seekers; Young fun seekers	
Vacationing couples	Urban getaway couples	

TECHNOLOGY

FROM...	...TOWARDS	IMPLICATIONS
Little knowledge about exotic/remote destinations	Information about new and emerging destinations easily accessible	<ul style="list-style-type: none"> • Most important: websites need to be user-friendly and updated regularly. • Increasingly sophisticated travelers who are experienced, well-educated and discriminating. • Information expected to be easily and readily accessible. • User-friendly planning/booking services key. • Non-traditional marketing efforts needed.
Advice from friends/relatives, and travel agent to plan trip	Internet most popular source of information	
Book by phone, through travel agent	Do-it-yourself planning/booking	
Planning in advance by telephone/in-person	Planning on short notice through web services	

³ **Market Segment:** A section of a geographic or demographic population that can be easily categorized and communicated with based on prevailing characteristics such as age, gender, location, education, socio-economic background and lifestyle.

FROM...	...TOWARDS	IMPLICATIONS
Independent tourism operators; own agenda	Tourism stakeholders connected; strong operator relationships	
Traditional marketing	Web marketing	
Drive inquiries by direct mail/phone	Drive inquiries to web	

1.1 IMPLICATIONS AND MARKETING INSIGHTS

Based on the analysis of trends in tourism, information analyzed through surveys and existing literature, and Tract's consistent approach to high-value, targeted tourism strategy, there are four key insights that serve as critical starting points for a more detailed product-market ROI analysis.

1. Products, packages and attractions must fit destination's theme.

Specifically, given the investment in the development of a theme for the Town, continuity should remain both in theme and further asset development: Beautiful Torbay. This concept is consistent with both the culture and location of the Town.

2. Focus on high-ROI markets.

It is often difficult to focus on a small number of markets, because many towns want to be 'all things to all people'. However, for Torbay, given that there are scarce resources, many competitors and great difficulty in differentiating, it is important to create an impact, and maintain a consistent message over time to spread reach. Niche marketing is a growing trend in tourism (that is, focusing on a very small, but well defined market), so it is recommended that Torbay concentrate on fewer, smaller markets, and that product development should match these markets' needs.

3. Develop Technology - Enhance website.

Tourists are using electronic media such as the web, email and social media for gathering information and for planning. This trend has revolutionized how tourists gather their information – most go online rather than call, and most are very educated about their destinations before they arrive. Torbay's website can be a tourist's primary information source and key marketing tool, with simplicity and interactivity as keys.

The current web-design suits the Town brand - look and feel. The site does need content, and interesting applications.

We suggest:

- Minimal design change. Colours fit the brand, and the architecture of the site is consistent with industry standards, decrease the amount of text and slightly increase the point size of the text for usability purposes. (see Appendix C)
- Bigger, more compelling pictures in the tourism website. Also, the content **MUST** be relevant to tourism, and not 'administrative'. Twenty great pictures would be way better than a blurb about Torbay's history. Each photo needs a short write up (10-20 words) similar to or the same as the community profile. Use the profile as a good guide for what that sort of content should look like and be about.
- Use of outside applications to the town's advantage: Google Maps, Google Calendar, Flickr (as examples) are free/cheap means of organizing town events, photos and town directions using technology that already exists.
- Create a Torbay fan page on Facebook. There has to be meaningful content, that the tourism coordinator should develop. Photo contests, stories from home, or some other regular content, otherwise the page is pretty much meaningless.
- Consider setting up a Twitter feed. Daily tweets about things that are happening (that are relevant) represent an amazing way of communicating with people who are interested.
- Develop a good search engine optimization strategy.

4. Build Partnerships.

By building partnerships and relationships among industry stakeholders (tour operators, other municipalities, businesses, Destination St. John's), various communities and interest groups can work together to be more successful. In particular, because many of these groups do not have a sufficient number of assets and attractions to hold tourists' attention for long spans of time, cooperation becomes even more critical.

1.2 PRODUCT / MARKET MATCHING.⁴

Products and Markets

In general terms, there are several products that exist in Torbay that match visitor profile. This information was listed and outlined as a starting point to determine the product categories and appropriate matches:

- Access to nature / scenery
- Guided boat tours
- Historic sites
- Close proximity to airport
- Close proximity to urban centre (shopping, entertainment, dining, etc.)
- New arena

Product development considerations:

When considering how to assess which markets are most appropriate for the Town of Torbay, several factors need to be analyzed to determine where the best opportunities lie. These factors are:

- Close proximity to the City of St. John's and the airport.
- Package bundles (accommodations, dining, tours, entertainment, etc.) within Torbay.
- Package bundles (accommodations, dining, tours, entertainment, etc.) with neighbouring towns and the City of St. John's.
- Needs of residents, and former residents and family who may be visiting.
- Interactive tourism media on website (i.e., Town guide, maps, trip planning tools).
- Detailed Town business directory on website.
- Link to Virtual Tours on website homepage (not buried under Tourism).
- The existing level of awareness of Torbay, which is considered to be moderate to high among in-province tourists, but very low among out-of-province tourists.
- Increased promotion of the Town (such as getting recognized in NL and Canadian magazines, web links, mail-outs, and increased visual media around Town and in other towns).

Markets were identified and segmented both in terms of geographic locations and lifestyle/ demographic profiles. These markets were then used to help define markets to match against products identified as being key opportunities. In broad terms, based on this information, provincial tourism information, and extrapolating from other tourism studies and reports, four product category offerings, and four broad target groups were defined as:

⁴ General Assessment

Product Categories:

1. **Passive Nature Activities:** natural activities that are passive in description – specifically activities that are observed, or that happen to the tourist (bird watching, automobile touring, etc.).
2. **Active Nature Activities:** natural activities that are active in description – specifically activities that are participatory (though not necessarily strenuous), that the tourist is a participant in (hiking, whale watching, etc.).
3. **Cultural Activities:** natural or indoor activities that involve art, performance or interpretation (museums, plays, etc.).
4. **Comprehensive (Cross-Category) Packages:** a variety of passive, active, cultural, culinary, sports, touring or other activities that typically involve a schedule and a specific price for the entire package.

Target Groups:

1. **Older In-province tourists (36+):** Tourists originating from the province of Newfoundland and Labrador who are on vacation or visiting friends and relatives. They typically have children but may not necessarily have their children with them on vacation.
2. **Younger In-province tourists (19-35):** Tourists originating from the province of Newfoundland and Labrador who are on vacation or visiting friends and relatives. They typically do not have children (other than young families with small children), and often travel in small groups or as couples.
3. **Out-of-province tourists (19+):** Have sought Newfoundland and Labrador for a specific reason, and are drawn to vacation for some of their time in St. John's. Trends suggest that they are looking for 'off the beaten path' tourism opportunities, and see Newfoundland as a quaint, distinctly different location for their vacation.
4. **Current Torbay residents and their extended families:** People living in Torbay or who have spent much time in Torbay in their lifetimes. This group is intimately familiar with the Town, its infrastructure and its history.

2.0 MARKET ASSESSMENT

The overall **Market Assessment Tool** developed for this study uses many factors to determine highest potential ROI. The two major discriminating factors are (1) location of the market: resident market (from the province/from the community of Torbay) versus non-resident market (from outside of the province) and (2) major area of interest (such as active, passive, or cultural activities). The additional factors used in the analysis include:

- Size of markets
- Marketing investment required
- Infrastructure/product development investment required
- Daily Visitor Spending
- Total Spending Index
- Return on Investment
- Prioritization based on Return on Investment

This process for reviewing markets for the Town was complex. A market can be defined in terms of a geographic region (e.g. in province, local resident, etc.) and by the type of experience that they are seeking (e.g. active adventure, cultural). The model that was developed highlights this multi-faceted view of market assessment, to define the raw market size by geographic region, and then the qualified market size who are interested in particular products.

The assessment tool that was developed then considered whether the market was growing or shrinking, and how easily the particular market could be persuaded to actually come to Torbay to experience the product (based on their awareness of the town and product, accessibility, product differentiation compared to competitors, etc.).

From this, each defined market was assigned a market potential, representing a true snapshot of the size of the market that was considered available.

There are, in theory, hundreds of product-market combinations. Many of them are niche, and would be impossible to analyze with any degree of accuracy. Using the **Market Assessment Tool**, 16 product-markets were defined (4 markets x 4 product categories), and seven were identified as having some market potential worth considering. The Assessment Tool is found in Appendix A.

Table of products and markets, and matching based on level of interest:

Target Markets				
Product Categories	Older In-province tourists (36+)	Younger In-province tourists (19-35)	Out of province tourists (19+)	Current Torbay residents and their extended families
Passive Nature Activities	4	1	3	4
Active Nature Activities	2	5	4	3
Cultural Activities	3	2	3	4
Comprehensive (Cross-Category) Packages	3	4	5	1

1 = poor match; 3 = good match; 5 = excellent match.

Based on knowledge of tourism markets, and expected level of interest in various activities for various markets, this assessment identified two excellent matches and five very good matches:

Excellent Matches:

- Younger In-province tourists seeking active nature activities
- Out-of-province tourists seeking packages

Very Good Matches:

- Older in-province tourists seeking passive nature activities
- Younger in-province tourists seeking packages
- Out-of-province tourists seeking active nature activities
- Current residents seeking passive nature activities
- Current residents seeking cultural activities

These seven matches may not necessarily represent the best opportunities – the product market matching process merely outlines which existing and potential products match well with existing and potential markets. They outline markets that are looking for assets that Torbay has. Before it can be determined which of these opportunities represent the *best* opportunities, a ROI analysis must be undertaken, to determine which matches have the potential to yield the best tourism return on investment opportunities.

3.0 RETURN ON INVESTMENT (ROI) MODEL

Enhancing the Town of Torbay's tourism offering could generate a new source of money for the Town's economy. Enhancing tourism activity results in localized economic benefits in the Town. Economic impacts are generated by two types of activities: (1) visitor expenditures; and, (2) investments in infrastructure by businesses and government.

In terms of visitor expenditures, this includes such things as accommodations, food and beverages, and retail sales. Investments in infrastructure refer to construction, materials and services.

Evaluating a return on investment is chiefly about determining the positive economic impacts, including contribution to Gross Domestic Product (GDP) from the tourism sector, as well as higher employment levels, greater income earned by the workforce and municipal tax revenue. Secondary to these are community impacts, multiplier effects, and business impacts, which should be considered in the process.

For the purposes of the **Return on Investment Model** developed for Torbay, the steps used to determine the economic impacts for various markets include:

Step One - For each target market and product activity a Spending Index on a per visitor basis was developed. This index was determined through knowledge of the tourism industry and spending indices used in other studies.

Step Two – Determine the 'per day' spending estimate derived in Step 1, based on the market potential defined in the market assessment. Assume the number of days that the spending would take place in Torbay to be an average of ½ day for the in-province/local market, and 1 day for the out-of-province market.

Step Three – Determine ROI (Step 1 and 2) and then compare the total spending index to the estimated investment cost. This will result in order of magnitude opportunity markets for Torbay. Bear in mind that the ROI tool refers to a spending *index* – which looks at money returned to the Town based on spending, not profit returned to the Town (as ROI would be calculated for a private business).

The ROI Index sets are as follows:

- **\$: LOW ROI:** Will take many years to recover upfront investment.
- **\$\$: Moderate ROI:** Less than one year to recover upfront investment, with a spending to Investment ratio 5:1 or less.
- **\$\$\$: High ROI:** Less than one year to recover upfront investment, with a spending to Investment ratio 5-10:1.
- **\$\$\$\$: Very High ROI:** Less than one year to recover upfront investment, with a spending to Investment ratio greater than 10:1.

Based on this analysis, two (2) primary opportunity product market matches, and two secondary product market matches were identified. The Market Assessment and Economic Assessment Tools are shown in Appendix A.

Moderate ROI Product Market matches:

1. Out-of-province tourists seeking packages (Moderate)
2. Out-of-province tourists seeking active nature activities (Moderate)

These particular product-market matches are rated as moderate because the base of tourists is fairly large in size (each with a large market potential of over 12,000 visitors to the Town, among tourists with high daily spending indexes). The investment required to attract this market to the Town (marketing) is high and the investment for infrastructure development is moderate, limiting return on investment. In addition, out-of province visitors are expected to spend a full day in a particular location (compared with ½ day stays among resident tourists whose vacations are typically shorter). Finally, the activities in which these tourists are engaged (packages and active nature) lend themselves to a higher per day expenditure than other activities.

Low to Moderate ROI Product Market Matches:

1. In province 19-35 seeking packages (Low to Moderate)
2. In province 19-35 seeking active nature activities (Low to Moderate)

These product-market matches are low to moderate because the market potential for these groups is quite low – meaning that while the number of people in the populations of each group are substantial, their ease of persuasion (to attract them specifically to Torbay) is seen to be low. In addition, in-province tourists have a lower daily spending index, plus they are less likely to spend as much time in a particular

Town, meaning that their expected stay in a community is only ½ day as their vacations are typically shorter.

Low to very low ROI Product-Market Matches:

1. In-province 36+ seeking passive nature activities (Low)
2. Current residents seeking cultural activities (Low)
3. Current residents seeking passive nature activities (Very Low)

These product-market matches are not seen as having significant ROI opportunities. For the in-province market, this match is seeking passive nature activities – activities in which the visitors are not expected to spend very much money. In this case, attracting a large number of visitors to Torbay would not yield a significant return on investment, because the tourists are spending very little. For the local markets, the spending index is extremely low, meaning that Torbay residents may take advantage of the local assets in high numbers, but will not likely spend very much money participating in tourism activities within their own town. A more detailed review of this analysis is found in Appendix A.

Implications of ROI Analysis:

The implications of this analysis are that the only major viable markets available for Torbay are the Non-Resident Markets who are already visiting St. John's. Particularly, Torbay's opportunity rests with being able to attract these existing tourists through offering active nature activities and to be part of product packaging that will attract them to the Town. The market potential for each group is over 12,000 visitors per year, and these groups tend to spend more money than the resident market. To achieve success with these two product-market matches, there are a series of recommendations outlined in the Section 4.0: Town Theme.

Existing and prospective products to match out-of-province tourists:

From a product/product development standpoint, there are several existing products that could match with this market – for both active adventure and packages – and several that are listed as recommendations.

Existing:

- Bed and Breakfasts
- Historic Sites. Note that many or most of these sites are more passive in nature, but could be part of larger packages or activities as additional products are developed in the Town.
- Hiking Trails (such as East Coast Trail)

- Jack Byrne Arena events

Proposed product developments:

- Town Centre VIC
- Implementation of Torbay Heritage Plan
- Water-based activities
- Park developments, particularly coastal parks
- Torbay Beautification Plan
- Linear Park System

4.0 TOWN THEME

As presented in the analysis for the Town of Torbay, the tourism opportunities for the development of unique experiences for tourists are *limited*. The analysis – as presented as a series of charts, tables and detailed approach – can be distilled down to a simple conclusion for the Town: Torbay is not a major tourism destination, but it does have some unique opportunities. Fortunately, however, the Town can still benefit. There are several key undertakings for the Town that can enhance its tourism opportunities. They consist of:

- Involvement with package development: with businesses, tour companies, the province and other towns.
- Continuing to embrace (and further embrace) the theme of “Beautiful Torbay”. This goes beyond graphic standards and logo usage, to include beauty in infrastructure development, marketing, photography, packaging, and attraction development.
- Development of the Beautification Plan, designed to increase civic pride; demonstrate a more beautiful place; improve marketing and promotional potential; increase tourism; decrease vandalism; increase environmental awareness; and increase education and participation in the beautification program.
- Product development, using the Torbay Recreation Master Plan and the Torbay Heritage Plan. Implement components that support the findings of the Comprehensive Tourism Plan: Town Centre trail system, coastal parks, lookouts, heritage assets, and water-based recreation activities.

4.1 CREATIVE STRATEGY

To capture the Town’s themes and overall approach, it is important to reinforce the creative strategy that was developed for the Town when the logo and creative theme “Beautiful Torbay” were originally developed.

- **Core creative philosophy:**

The key to developing a high-impact creative concept that will work as an overall Town theme, signage strategy, corporate logo, or advertising campaign is to be focused in the approach.

- **Creative objectives and strategy:**

The creative objectives are to build interest, in visiting and doing business in the Town, and to generate pride among residents. The creative strategies are to differentiate Torbay from other communities, and to bring everyone together under a pride-building banner. The brand positioning for Torbay is to build community unity through the theme of “Beautiful Torbay”.

To development of this Plan is done within the context of tourism along the Killick Coast. Torbay is the gateway to the Killick Coast and the developments within the Plan must be seen in the context of tourism development in the Region. The intent being to extend visitor stays and encourage exploration of the entire area. For this reason, we are proposing that both the Destination Marketing Organization for Eastern Newfoundland, Destination St. John’s and the economic development agency, Capital Coast Development Alliance be continuously engaged in the development of the Tourism Plan, to ensure initiatives both compliment and support regional tourism development.

4.2 PRODUCT DEVELOPMENT AND MARKETING PRIORITIES

To appeal to our two primary target markets, and to further develop the Town of Torbay as a better, more beautiful place to live, there are twelve product development and marketing recommendations put forth. Many of these recommendations connect with existing recommendations in Torbay’s Recreation Master Plan and Heritage Plan.

- **Recommendation 1: Development of a Visitor Information Centre (VIC) in the Town Centre.**

This strategically located VIC would be an ideal gateway to the Killick Coast, and could act as a focal point for tourists already touring the Killick Coast, or for those who need guidance and information. Torbay can become the catalyst for the development of touring on the Killick Coast by positioning the Town as the gateway to the Killick Coast, and by building touring opportunities through the development of the VIC. The VIC should be developed as a central component of the Town Centre. Support for positioning Torbay as the gateway to the Killick Coast should be sought from Destination St. John’s.

- **Recommendation 2: Adoption of direction from a Torbay Beautification Plan.**

The overall direction of this plan would include a more formalized approach to such things as gateways, public art, streetscapes, urban furniture, lighting, and sustainable initiatives. The

Beautification Plan will be developed using the existing recommended creative strategy as outlined in the Beautiful Torbay strategy and creative direction.

- **Recommendation 3: Connect directly with Destination St. John's in partnership.**

Both formal and informal discussions with officials in the City of St. John's and with employees of Destination St. John's have resulted in a general desire to work with outlying communities in partnership. Because 85% of tourists who come to Newfoundland end up in St. John's, there is a regular need to offer these groups opportunities to see and do a variety of things. Developing a tour and/or package option with Destination St. John's and possibly other communities could result in an increase in tourism numbers from out-of-province tourists.

- **Recommendation 4: Develop niche promotional materials targeting out-of-province visitors already coming to the province.**

Using existing promotional materials (provincial travel guide and website), and proprietary promotional materials developed by Torbay (brochure for St. John's hotels and airport, social media (Facebook) and enhanced Torbay website), the Town should focus on accentuating active nature packages to these markets under the banner of "Beautiful Torbay". Niche promotional materials to be developed will correspond to the strategic priorities of the development of physical assets for the Town.

Examples of materials and promotional cues to be developed include:

- Promotional strategy linked to existing provincial promotional strategy (such as advertising in Travel Guide, partnerships as they become available, web links).
- Advertisements should be 1/3 of a page as a minimum or larger and be supported by professional photography.
- Online strategy for Facebook promotion and search engine optimization (see Recommendation 12).
- Gateway Signage for the Town.
- Roadside beautification.
- Plantings in strategic areas.
- Beautification of public amenities.
- Website redevelopment. (see Appendix C)
- Torbay Community Profile distributed to key target audiences.
- Revisit and edit Wikipedia entry for the Town, ensuring that all information and links are both current and branded (presently, the information is static, primarily historical in nature (not tourism focused) and does not reflect the Torbay brand).

- **Recommendation 5: Torbay as a gateway to the East Coast Trail.**

Because the East Coast Trail is already a commodity being sought by resident and non-resident tourists alike and because Torbay is one of the easier places to access the trails, it is suggested that the Town promote itself as a gateway to the East Coast Trail. This promotion should be supported by the development and upgrading of the trail in the Town and the construction of key supporting infrastructure, such as the coastal park proposed in the Torbay Recreation Master Plan.

- **Recommendation 6: Further develop simple physical assets that promote tourism, while beautifying the Town in a unique and aesthetically pleasing manner.**

This recommendation should be considered in concert with the Beautification Plan, and outline specific examples of asset development that would reinforce the Town's positioning of "Beautiful Torbay". This includes the development (and further development/beautification) of lookouts, footbridges, a war memorial and banners that embrace the spirit of the Town.

- **Recommendation 7: Development of a linear system to link assets.**

A means of connecting physical assets is a critical step to keeping non-resident tourists in the community longer. Physical linkages have always proven to be simple but critical ways of keeping tourists longer in an individual location. The linear connection system recommended in the Torbay Recreation Master Plan should be developed as a strategic component of this plan.

- **Recommendation 8: Implement Heritage Plan's "placemaking strategy" - Town Centre.**

The recently completed Torbay Heritage Plan recommends a number of appropriate product development initiatives to provide opportunities for visitors to stop and enjoy the Town. Key among them is the creation of a Town Centre that would include a number of assets and attractions visitors to Torbay seek: restaurant, cultural attractions, handicrafts, performances, recreation amenities, local shopping, public washrooms and visitor information. The plan also recommends the development of historically important areas that can be interpreted and linked via a series of walking trails to the Town Centre and the greater community.

- **Recommendation 9: Assessment of Park Development.**

It is specifically recommended that Three Corner Pond Park be investigated as a location for a youth activity adventure park, as proposed in the Torbay Recreation Master Plan. This park could be a key asset for all target markets (active and passive, resident and non-resident).

- **Recommendation 10: Creation of water-based activities.**

A review of the opportunity for the development of activities that are developed in and around water (such as boat tours and whale watching) should be considered as a long-term opportunity

to draw tourists to the area. Water-based activities recommended in the Torbay Recreation Master Plan should be developed as a strategic component of this plan.

- **Recommendation 11: Increased usage of Torbay’s mascot ‘Ollie-T’, the Lion from the Sea.**

Few communities have such an interesting, relevant and professionally designed mascot. While not the central focus of spirit building or marketing for the Town, ‘Ollie-T’ is a unique and interesting facet of Torbay that should be leveraged, particularly at events and openings that are festive.

Examples of the opportunities to use ‘Ollie-T’ include:

- Winterlights
- Special council events
- Openings of new assets (such as the Town Centre)
- Social Networking strategy (‘Ollie-T’ should be used as the Facebook personality profile that administrates a Torbay fan page and invites users to special events).
- Promotional giveaways
- As a component of advertising strategies
- On the Torbay website: a graphic illustration of ‘Ollie-T’ can be used as a tourism icon on the website.

- **Recommendation 12: Develop a more comprehensive electronic communications strategy.**

There are four key steps that the Town of Torbay can take to gain a tourism advantage by means of electronic media:

- **Integrate Community Profile with website.** As the new Town community profile is being developed, the look, feel and content of the website should be strongly integrated with the community profile’s direction, which uses compelling photography and strongly reinforces the “Beautiful Torbay” creative concept.
- **Use Facebook as a social medium.** Create a fan page for the Town of Torbay, schedule events as a reminder strategy for friends of the Town of Torbay, and experiment with sidebar advertising to drive traffic to the Torbay website. ‘Ollie-T’ can become an important part of this strategy. It is recommended that the Town create a Facebook profile for ‘Ollie-T’, gain Facebook friends for ‘Ollie-T’, and then use this profile to feed news to friends, give daily updates (through Facebook and/or Twitter) and invite friends to Town events.
- **Use Google as a more powerful search engine for driving traffic to the Torbay website.** There are several methods of using Google for this purpose, and the two that would be most effective for Torbay are: (1) ensure that key search terms that are relevant to the Town (such as “Newfoundland hiking”, “East Coast Trail”, “Newfoundland tourism packages” etc.) appear on the main page of the Town’s website; and (2) create unique

landing pages that Google will find specifically for certain search terms (e.g. create an East Coast Trail sub-page, that has relevant information about the trail, and update it frequently so that Google will find it). Other approaches such as paid searches and search engine optimization should be investigated with a student or a local e-communications expert to establish their feasibility.

- **Improve tourism information on the Town website.** Specifically, tourism-related websites should include visually stunning examples of the location, with words that evoke the greatest strengths of the Town. Currently, the tourism section of the Torbay website is not prominent on the site, and is both static in its look and administrative in its content. The content looks more like historical information than tourism information. Specifically, many of the titles of sections in the Tourism page are not written or presented in a compelling manner (for example, the first link is “weather conditions”, whereas the most important and prominent link should be “things to do”). The Town should consider making the links on the Tourism page more tourist-centric, using titles such as “Beautiful Faces”, “Beautiful Places”, “Beautiful Events”, etc. It is recommended that the tourism section of the website include:
 - Content that would be relevant to a prospective tourist, specifically one from our key out-of-province audience: why we are different, how to get here (in map form), what there is to see and do, etc.
 - Powerful photography, perhaps as a refreshing banner.
 - Simple, short messages about the Town’s beauty and benefits – the current information is too long to read.
 - An events calendar (easily available as freeware or open-source applications through Google and other providers).
 - An amenities section, outlining, what is available in the way of restaurants, accommodations and other core tourism amenities.
 - Historic sites and events, outlining the many cultural and historic sites available for tourists.
 - Investigation of a simple online application such as Google Maps to pinpoint the locations of sites, amenities and gateways for tourists.
 - The existing section labeled “Virtual Tours” does not meet the expectations of what a Virtual Tour is considered to be by web users. Presently, the virtual tour consists of three short videos, but should be more dynamic (such as the Google Maps application already described).
 - Add Facebook and Twitter links to the main website, once these are properly set up and administrated. This will allow residents, former residents and prospective tourists to gain timely information, changes, and event information through these other web platforms.

- **Recommendation 13: Retain a Tourism Coordinator to support implementing the Comprehensive Tourism Plan.** Section 5: Implementation Plan is a suggestion to make the Tourism Plan a reality. It suggests framework for implementation and is not an end in and of itself: it simply serves as a guide. While we propose that the Plan's implementation be the responsibility of the Economic Development Division, we feel that the division's resources must be augmented to support the successful development of the Tourism Plan. We are, therefore, suggesting that a Tourism Coordinator position be established to assist the Economic Development Officers in making the plan a reality.

Product Development Priorities

There are three product development initiatives that are considered to be top priorities:

1. **Town Centre development:** first priority because it provides a focal point for the Town, allows the Town the opportunity to reinforce its "Beautiful Torbay" positioning, and it will become both the location of the VIC and the gateway for the Killick Coast.
2. **Torbay Beautification Plan:** second priority for the Town, as it supports the Town's positioning, and can be developed in phases over multiple budget years.
3. **Development of physically and thematically linked assets:** third priority is most notably the trail system, gateway signage and community parks. Physical asset development is also a high priority because it begins to offer additional things to see and do in the Town, acting as a magnet for tourists and a reinforcement of "Beautiful Torbay".

5.0 IMPLEMENTATION PLAN

To ensure the Town of Torbay Comprehensive Tourism Plan is successfully implemented, the community must:

1. Form a tourism committee that is endorsed as the primary coordinating body for tourism by the Town, the local business community, and any other organizations with tourism interests. (see Section 5.1)
2. Confirm the community tourism development priorities found in the Plan and create tourism development policy statements that reflect these priorities as a component of the Municipal Plan.
3. Create a statement of purpose and bylaws for the committee.
4. Establish lines of communication and develop a flow of information between council, the public, and partners.
5. Foster a spirit of cooperation and coordination among agencies and organizations within Torbay and the region.
6. Create awareness in your community about your tourism priorities through media, community newsletter and other channels.
7. Confirm methods for financing options, promotions, and capital improvements associated with Comprehensive Tourism Plan.
8. Develop an action program; set objectives and methods of accomplishing them.
9. Hire a Tourism Coordinator to assist the Economic Development Division in implementing the Tourism Plan.

The proposed tourism initiatives in the Town focus on developing quality supporting infrastructure such as and better signage and better visitor information services. We've also proposed developing attractions that will encourage visitors to stay and explore: trails, lookouts, parks, interpretation, community centre, water based activities, and rest areas. It is hoped that these developments will support existing businesses, encourage entrepreneurship and re-investment, and maintain the visual integrity and social character of the Town – the qualities that make Torbay an attractive place to live, visit, and invest.

The focus of the Torbay Comprehensive Tourism Plan is to increase the Town's capacity to attract visitors and extend their stay in the community. Once the infrastructure improvements suggested are in

place, and your tourism sector and development partners are established, then a vigorous marketing and communications plan can be set in motion.

To implement the proposed plan, and its components, will require dedicated staff, the financial support of the Town, and the support of various public agencies. The Implementation Plan must be coordinated and developed in stages. Tourism management must become a part of the day-to-day reality of managing the community as a whole. It is not a summer enterprise; it is a year round commitment.

5.1 TOURISM SECTOR AND PARTNER DEVELOPMENT

For tourism to be successful in Torbay, the proposed tourism committee will need to:

1. Focus on supporting successful tourism-oriented businesses, such as tour boating operators, craft stores, restaurants, and accommodations; and, support the development of new tourism-oriented businesses.
2. Develop a market-ready 'product' within the local economy, such as the proposed Community Centre, to support tourism and economic development.

For tourism and future investment to be successful, the community as a whole must believe in the course of action and specific developments as proposed in the Comprehensive Tourism Plan. Businesses, in particular, must agree to participate, as they have the most to gain and the most to lose. This participation might range from financial commitments and formal partnerships, to involvement on volunteer committees. Of great importance is the need to support and recognize the contribution of local entrepreneurs and encourage their meaningful involvement in the future development of Torbay's tourism product.

A public and private partnership is one of the best organizational frameworks to support tourism development in rural areas. These partnerships cannot be successful, however, without good facilitation and communication. Stakeholders need to be encouraged to work together, share ideas, pool resources, and agree on tourism priorities for the Town.

The following outlines the key components of the Tourism Sector and Partner Development. It begins with an outline of the existing situation relative to the topic and follows with proposed adjustments to support implementing the plan.

5.1.1 TOURISM COMMITTEE – PROPOSED STRUCTURE AND ROLES

Form a Tourism Development Committee that would work with Council and senior staff to deal with the issues of infrastructure development, policy, advocacy, and strategic planning.

The Tourism Development Committee's key initial role will be to oversee the implementation of the Comprehensive Tourism Plan. A Tourism Coordinator should be assigned by the Town to, through the Economic Development Division, assist the Committee. The coordinator would report to the Economic Development Officer and be responsible implementing the recommendations found in the plan. The position require an individual with business administration, project management and marketing skills. The first and key task of this individual would be to, under the direction of the Economic development Officer, develop a detailed work plan to outline a process, timeline, resources and milestone to support the implementation of the Tourism Plan. Council would need to approve this work plan.

Tourism Coordinator

The Tourism Coordinator need to be a professional with a degree, either in business/public relations or hospitality and 3 - 5 years experience. This person should be responsible for web strategy, marketing research, promotions management, liaison with local and areas attractions, working closely with Economic Development Officer and Town Council/Chief Administration Officer on all tourism-related activities.

Tourism Committee Structure

The Tourism Committee would be a committee of Council and have a total of eight members - three serving as an Executive Committee and the other five as Members.

Executive Committee

- 1 Member of Council (Chair)
- 1 Representatives from Local NGO's
- 1 Representatives from Local Tourism Businesses

Members

- 1 Member of Council
- 2 Representative from Local NGOs
- 3 representatives from Local Tourism Businesses

Ex-officio Members:

Town CAO
Economic Development Officer
Tourism Coordinator

Supporting Organizations:

Destination St. John's
Capital Coast Development Alliance

Note: The Supporting Organizations while not be sitting Members of the Tourism Committee but be invited to special meetings and be kept up-to-date with the activities of the Committee through regular communications via the Economic Development Division.

The Committee would report to Council and its key role would be to manage the implementation of the Tourism Master Plan as per the work plan to be developed by the Economic Development Division.

5.1.2 ATTRACTION OF CAPITAL SUPPORT AND INVESTMENT

The proposed Comprehensive Tourism Plan will require considerable investment of capital resources to support implementation.

Existing Conditions:

No organization is assigned the task of sourcing capital to support development. Traditional support from the various funding agencies and the Town must be considerable, therefore outside sources must be found if tourism is to be successful over the long term.

Proposed Structure and Roles:

The Tourism Development Committee needs to consider the selection of a sub-committee whose role will be to market and promote the Comprehensive Tourism Plan. The sub-committee might be called the Beautiful Torbay Society or Foundation.

This group might consist of current and expatriate residents of Torbay. Members could be asked to make a financial contribution to the development of the Town and its significant tourism products. The group would become a distinct philanthropic organization that:

- Provides working capital to support capital investment in tourism.
- Has some political influence.

The long-term goal would be for the group to be designated as a charity so that financial donors can be issued a tax receipt. The group could establish a community trust fund. The Town or the Development Committee could then make application to the group for capital support of projects, staffing, marketing and promotional initiatives. The chair of the group would be a local Champion for Tourism, who would manage the Trust. We would propose that the Town, through the Tourism Development Coordinator, be in charge of assessing the viability of setting up such an organization and develop the said list of expatriates.

5.1.3 COMMUNICATION AND INDUSTRY AWARENESS

It is essential that stakeholders receive updates about Torbay's tourism development and that they are regularly informed of the priorities and status of Torbay's Comprehensive Tourism Plan. Regular communications, such as the Town's current newsletter, can be a means to highlight other initiatives that might provide investment opportunities for local businesses. The Town might also consider using an e-newsletter.

Proposed Structure and Role:

The Tourism Development Coordinator would be responsible for providing updates on tourism through the existing newsletter for local residents that is distributed to all households and businesses. It would also be distributed to neighbouring municipalities and to the "Beautiful Torbay" group. This newsletter highlights Town initiatives with a focus on the implementation of the Comprehensive Tourism Plan, and updates on fundraising.

To generate revenue, local merchants would be offered an opportunity to purchase advertising in the newsletter. As well, the current Town website should be totally redesigned and positioned to support tourism development.

5.1.4 LAND DEVELOPMENT – RESIDENTIAL, COMMERCIAL/INDUSTRIAL AND AGRICULTURAL

Generally, controls over land development within the Town are outlined in a Municipal Plan. While this might be adequate in most circumstances, more needs to be done to integrate all levels of development relative to Torbay as a tourism destination.

Existing Conditions:

All land development is regulated within the context of the municipal plan.

Proposed Structure and Roles:

We propose that all future developments in the Town be planned to fit within aesthetic guidelines to ensure what they do not detract from 'Beautiful Torbay' as a tourism destination. Visitors come to our province and its communities to enjoy traditional architecture and unspoiled landscapes. We must do our best to ensure this architectural heritage is maintained and respected, not only to appeal to the tourism market, but also for the benefit of residents.

We would recommend:

1. Residential developments include a landscape plan and a visual analysis of the development's impact on the surrounding landscape. New developments should link with the proposed walkway system as per the Town's Recreation Plan.
2. Developments should include a vegetation management and retention plan.
3. Commercial developments should include landscaping plans that reflect the aesthetic qualities of 'Beautiful Torbay'. Commercial areas need to be upgraded to have a landscaping plan prepared and implemented.
4. Industrial development generally should be in a defined area with controlled access and vegetative buffering to reduce negative visual impact. Careful analysis of the visual impact should be undertaken and a means to reduce this impact implemented.

Recommendations 1-4 will be detailed in the Torbay Beautification Plan and are supported by the recently completed Municipal ICSP.

5.2 MARKETING AND COMMUNICATION

Understand branding and its role in marketing and promotion. Your brand is your promise; your promise is a good or service delivered to a client, in this case, a tourist. The Torbay brand revolves around 'Beautiful Torbay'; the promise is that Torbay is indeed beautiful, which has to be delivered.

With the proposed tourism infrastructure in place (road and signing infrastructure, progressive businesses, quality tourism attractions and amenities) and a clear understanding of markets, Torbay can move forward with a strategic and integrated marketing plan, a plan financially supported by the Town and local businesses.

The key components of a marketing plan are described in the following table.

Marketing Strategy Component	Component Description
<i>Cooperative Marketing Campaigns and Promotion</i>	Cooperative marketing campaigns can be developed by the Town and local businesses working together to promote Torbay to current visitors to St. John's.
<i>Database Development</i>	Database information about stakeholders, visitors' wants and needs, visitor satisfaction, the success of different programs, etc., could all be compiled into an active database. The information will be collected via questionnaires, and administered annually by volunteers and business owners in the Town.
<i>Direct Marketing to Consumers and Trade Shows</i>	Direct marketing can best be accomplished by Destination St. John's. It is important, however, that the Torbay Tourism Development Committee ensure that the Town is appropriately represented and presented to visitors.
<i>Familiarizations Tours</i>	Any FAM tours of the Avalon should include a visit to Torbay. The infrastructure developments will only serve to heighten the awareness and profile of Torbay.
<i>Print Advertising</i>	This includes advertising in newspapers and magazines. The focus should be on magazines whose readership is linked to your target markets. Local newspapers can be used to highlight special events in the Town.
<i>Printing and Distribution of Publications</i>	<p>The Town can print and distribute its own tourism lure piece, such as a brochure. This might be a general lure piece attracting visitors to the area. It is meant for high circulation to a general audience. The Town map and brochure concept graphic should be developed.</p> <p>A visitor guidebook or guiding brochure could, in time, also be developed. This would assist tourists in planning trips to the area and in finding resources and activities once they arrive on-site. This is meant for low to medium circulation. Such a guidebook could be jointly developed for the Killick Coast with the assistance of the Capital Coast Development Alliance and Destination St. John's.</p>
<i>Television and Radio Advertising</i>	<p>Generally, out-of-province advertising is handled by the Destination Marketing Organization, Destination St. John's, and the provincial government. Local television advertising can be used, however, to highlight a special event or specific attractions in the Town, but the cost is generally very high. The local cable network might be the best option as they may do a special segment on the Town as part of programming which may be repeated.</p> <p>Radio advertising is less expensive and can build awareness in target markets. Again this can be pricey. The best option might be to develop a news event around your story. For example, the development of the Community Centre is certainly newsworthy. Once the decision is made to proceed, a media release should come from the Town. When the facility is ready to open, the Town should have a large advertising campaign and seek television and radio coverage.</p>

Marketing Strategy Component	Component Description
<i>Web and Email Marketing and Positioning</i>	<p>It is said that the web is the best way to convert travel inquiries into transactions – purchasing travel products and services. The number of tourists booking vacations on the net is growing annually. It is important that the Town of Torbay endorse the use of the web and integrate the web as an important component of your marketing program. To be successful the website needs to be: informative but concise, easy to navigate, well-organized, comprehensive, and regularly updated and maintained.</p> <p>We recommend that the Town eventually update its website to match the graphic look and feel developed for the community, and provide a separate and distinct split between resident services and tourism services. The repositioned website would be a component of a larger marketing and positioning plan. Ideally, the website would be linked to tourism businesses and B&B accommodations so that potential visitors can get information and book online.</p> <p>We also suggest that the website be used to collect visitor information, including email addresses. The Town could then regularly send messages to potential and returning visitors outlining that season's events.</p>

5.2.1 LONG-TERM PLANNING

The Comprehensive Tourism Plan for Torbay must be set in the context of the Municipal Plan for the Town. The Municipal Plan should support and confirm the suggestions presented in the Comprehensive Tourism Plan.

Tourism-related suggestions that should be included in the Municipal Plan include:

1. A signing bylaw that will allow the Town to control the quality and distribution of signage through the Town.
2. A bylaw requiring landscaping plans for all new commercial properties, and encouragements from Council for existing commercial areas to be landscaped.
3. A bylaw that would support the maintenance of traditional architectural forms and materials, through the development of architectural guidelines.
4. A bylaw indicating that future housing and commercial developments implement a comprehensive approach to site design that integrates trails and other parks and open spaces, and maintains as much vegetation as possible.
5. A bylaw that includes general civic beautification guidelines and principles that support the maintenance of civic beauty and install community pride in Torbay.
6. A viewplanes study that confirms and protects those views that truly make Torbay beautiful.

5.3 IMPLEMENTATION PLAN BY PHASE AND TASK

Implementation Plan by Phase and Task		
Phase	Tasks	Outcomes
Phase I: Initial Fundraising and Organizational Review	<ul style="list-style-type: none"> • Solidify support from stakeholders. • Initiate key partnerships and buy-in from tourism-oriented business operators. • Complete Town Beautification Plan and based on same develop new policies that favour Town beautification. • Complete Feasibility Study Torbay Community Centre as per Heritage Plan. • Begin applications for funding to support capital development (Beautification Plan and Heritage Plan as per Feasibility Study) and organizational investments (Tourism Coordinator) as per Tourism Plan. • After initial staff funding is received, redefine existing staff duties and designate new Tourism Coordinator through Economic Development Division. • Torbay Tourism Committee put in place and Beautiful Torbay model assessed. 	<ul style="list-style-type: none"> • Support from stakeholders. • New focus for existing town structure towards solidifying Torbay as a tourism attraction • Successful funding applications. • Staff begins to implement the Comprehensive Tourism Plan. • Torbay Tourism Committee established.
Phase II: Detailed design (Stage 1)	<ul style="list-style-type: none"> • Initiate 'Beautiful Torbay' group. • Begin introducing new imagery and tourism focus (Beautiful Torbay and Ollie-T) to town website, key signage (town sign, gateway, and orientation to existing attractions). • Detailed design and installation of gateway signs, trails, lookouts, etc. • Detailed design and fundraising for initiatives outlined in the Comprehensive Tourism Plan. • Implement Beautification Plan recommendations. • Initiate volunteer town beautification program. • Begin detailed design Community Centre. 	<ul style="list-style-type: none"> • With a new, more unified and look and more coordinated marketing, the town begins to attract more visitors. • Attractions base begins to expand (new trails, lookouts, parks, etc). • Town is generally more attractive.
Phase III: Capital Development (Stage 2)	<ul style="list-style-type: none"> • Complete remaining developments. • Begin to promote Town. • Construct Community Centre and initiate programming and animation. 	<ul style="list-style-type: none"> • Town is generally more attractive. • Visitors have more diverse activities and are better oriented to the Town's offerings – they stay longer.
Phase IV: Promotion and Marketing Campaign	<ul style="list-style-type: none"> • Develop full marketing campaign. • Develop annual Festival or Special Events • Complete update to website and develop promotional package • VIC in Community Centre 	<ul style="list-style-type: none"> • Town is generally more attractive. • Town has an image as a must-see community. • Visitor information provided

Implementation Plan by Phase and Task		
On-going	<ul style="list-style-type: none"> • Management and maintenance of existing and growing infrastructure through fundraising and staffing. • Community involvement and support (Beautiful Torbay group) • Maintenance of partnerships. • Marketing and promotions. • Programming of new spaces and facilities. 	<ul style="list-style-type: none"> • Town is generally more attractive. • Community and partner support. • Ongoing growth in tourism and other business revenues.

6.0 CONCLUSION

This report represents a vision of the Town of Torbay, from a Tourism perspective. While it is focused primarily on return on investment, it has no guarantees. The general direction of the report recommends several major investments built around the central theme of Beautiful Torbay, with the overall goal of focusing growth and development in certain key areas to be attractive to prospective tourists, as well as enhance and enrich the lifestyle in the town.

This report has identified the key market segments that the Town of Torbay should focus on to realize the significant economic development benefits of tourism. The result should be to bring new money into the community to enhance the existing tax base and support the development of added amenities and services. Ideally, the plan will create meaningful jobs in the community, and hopefully new business start-ups.

To be successful, Torbay needs tourists to stop in the community – to have things to see and do, and places to spend their money. This plan identifies a number of initiatives that are meant to have visitors stay in the town longer, and create memorable experiences that will encourage repeat visits and very positive word of mouth.

The Torbay Comprehensive Tourism Plan and its recommendations will serve to support community economic development while making the community an even more attractive and fun place to live.

		Town of Torbay Market Assessment: Measures and patterns for each market												
Resident/Non-resident	Target Markets	Product/Activity	Raw size	Qualified Size	Trend ¹	Ease of Persuasion 2	Market Potential	Market Index 3	Marketing \$ ⁴	Investment 4	Spending Index / Visitor 5	Spending Index ⁶	ROI 7	ROI Ranking
Non-Resident	Out-of -province 19+	Active Nature	400,000	102,000	Growing	very low	12,750	5	\$\$\$	\$\$	\$\$\$\$	\$\$	\$\$	v
Non-Resident	Out-of -province 19+	Packages	400,000	102,000	Growing	very low	12,750	5	\$\$\$\$	\$\$	\$\$\$\$	\$\$\$	\$\$	v
Resident	In-province 18-35	Active Nature	100,000	40,000	Shrinking	very low	3,000	1	\$\$	\$\$	\$\$\$	\$\$	\$?
Resident	In-province 18-35	Packages	100,000	30,000	Shrinking	very low	2,250	1	\$\$\$	\$\$	\$\$\$	\$	\$?
Resident	In-province 36+	Passive Nature	300,000	25,000	Stable	low	6,250	3	\$\$	\$	\$	\$	\$	x
Local	Torbay Residents	Passive Nature	9,000	4,500	Growing	high	4,219	2	\$	\$	\$	\$	\$	x
Local	Torbay Residents	Cultural	9,000	4,500	Growing	medium	2,813	1	\$\$	\$\$	\$\$	\$	\$	x

1. Trends
Shrinking: Reduce by 25%
Stable: No change
Growing: Increase by 25%

2. Ease of Persuasion
High: Factor of 75%
Medium: Factor of 50%
Low: Factor of 25%
Very Low; factor of 10%
Niche: Factor of 1%
Minuscule: factor of .01%

3. Market Index	
0	2000 or less
1	2000-3999
2	4000-5999
3	6000-7999
4	8000-9999
5	10000-11999
6	12000-13999
7	14000-15999
8	16000-17999
9	18000-19999
10	20000+

4. Marketing and Investment \$
Spending over five years:
\$ = \$0
\$\$ = \$50K
\$\$\$ = \$100K
\$\$\$\$ = \$250K
\$\$\$\$\$ = \$500K+

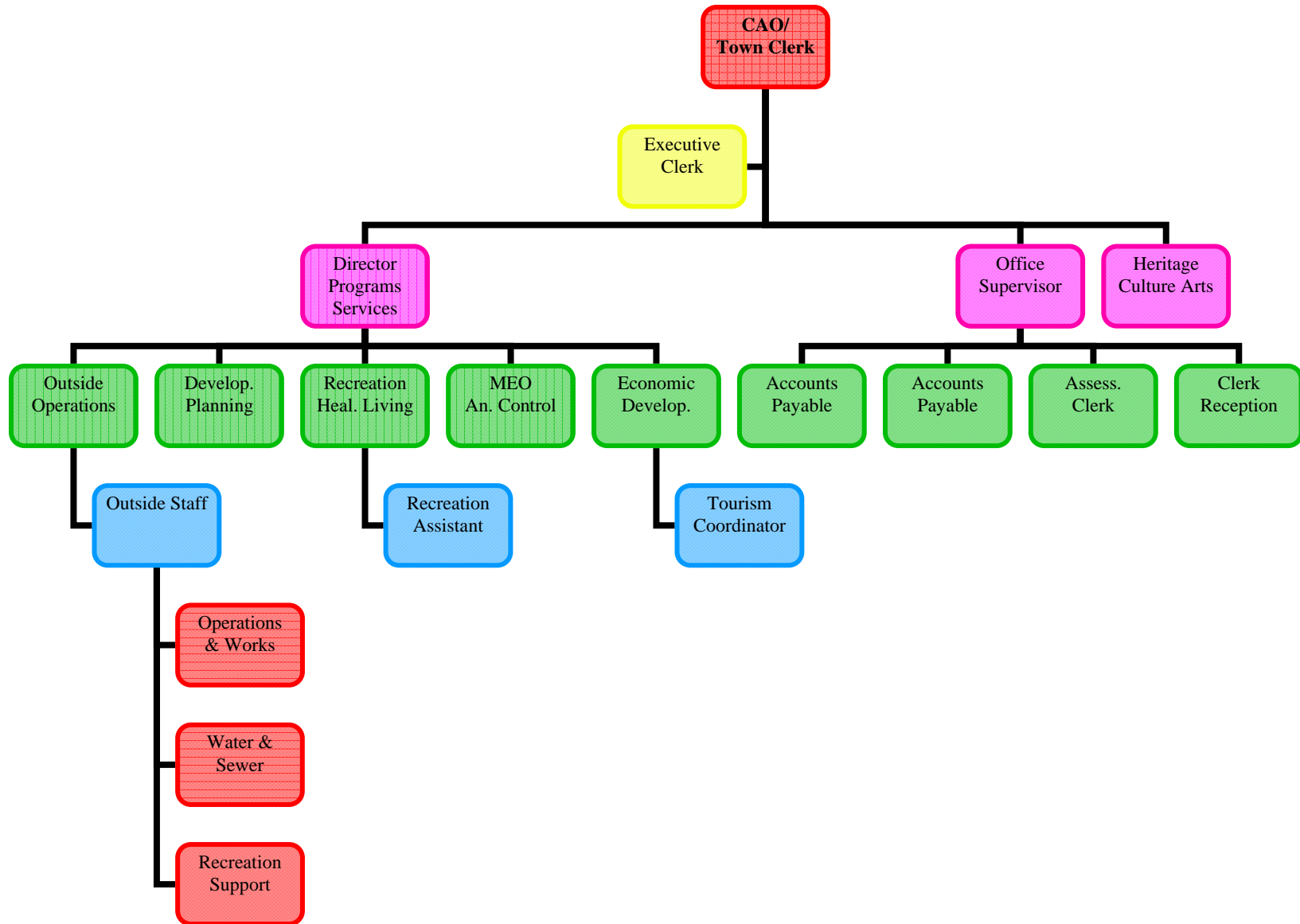
5. Spending Index per Visitor
\$ - \$50 per day
\$\$ - \$100 per day
\$\$\$ - \$200 per day
\$\$\$\$ - \$300 per day.

6. Total Spending Index
\$ - < \$400,000
\$\$ - \$400,000 - \$800,000
\$\$\$ - \$800,000 - \$1,200,000
\$\$\$\$ - > \$1,200,000

7. ROI Index
\$ - LOW: 1 or more years to recover upfront investment
\$\$ - MEDIUM : Less than one year to recover upfront investment - Spending to Investment ratio 5:1 or less
\$\$\$ - HIGH: Less than one year to recover upfront investment - Spending to Investment ratio 5-10:1
\$\$\$\$ - VERY HIGH: Less than one year to recover upfront investment - Spending to Investment ratio greater than 10:1.

APPENDIX B

Organizational Structure



APPENDIX C

Sample Tourism Advertisement and Webpage
(CD-Rom)

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