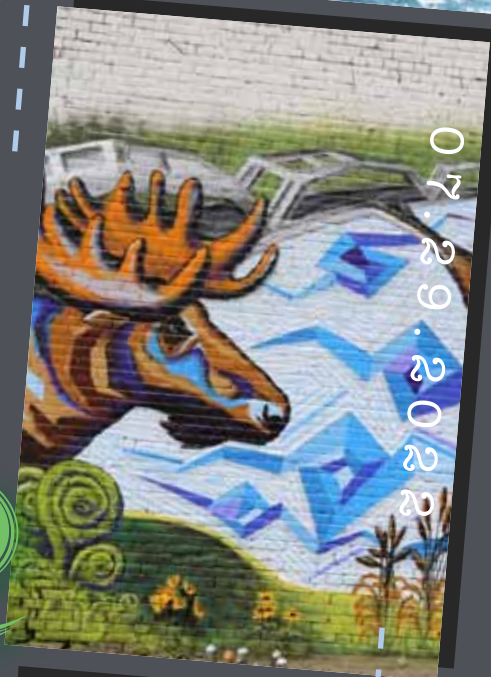


Upper River Valley

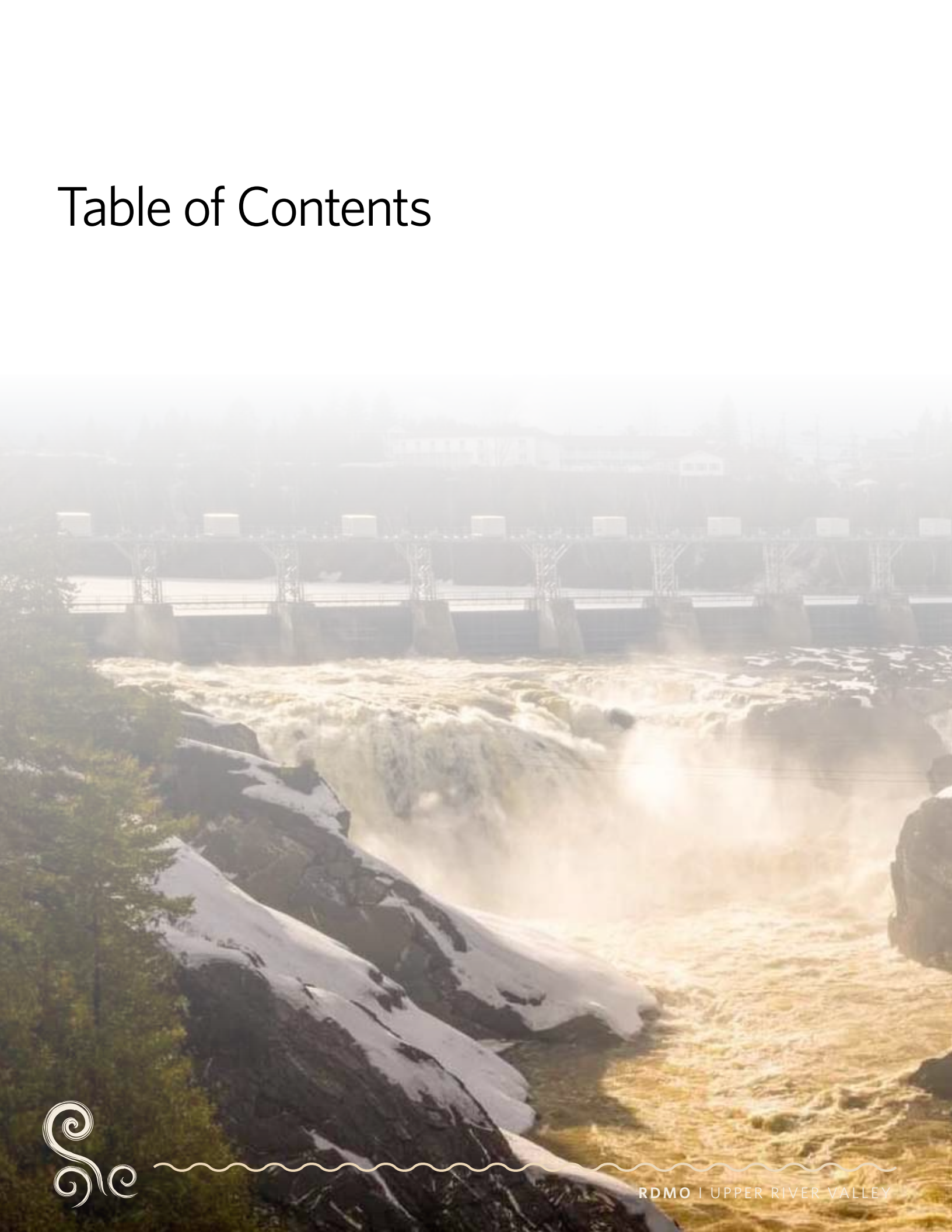
DIAGNOSTIC REVIEW

REGIONAL DESTINATION
MARKETING ORGANIZATION



07.29.2022
Bremner & Associates

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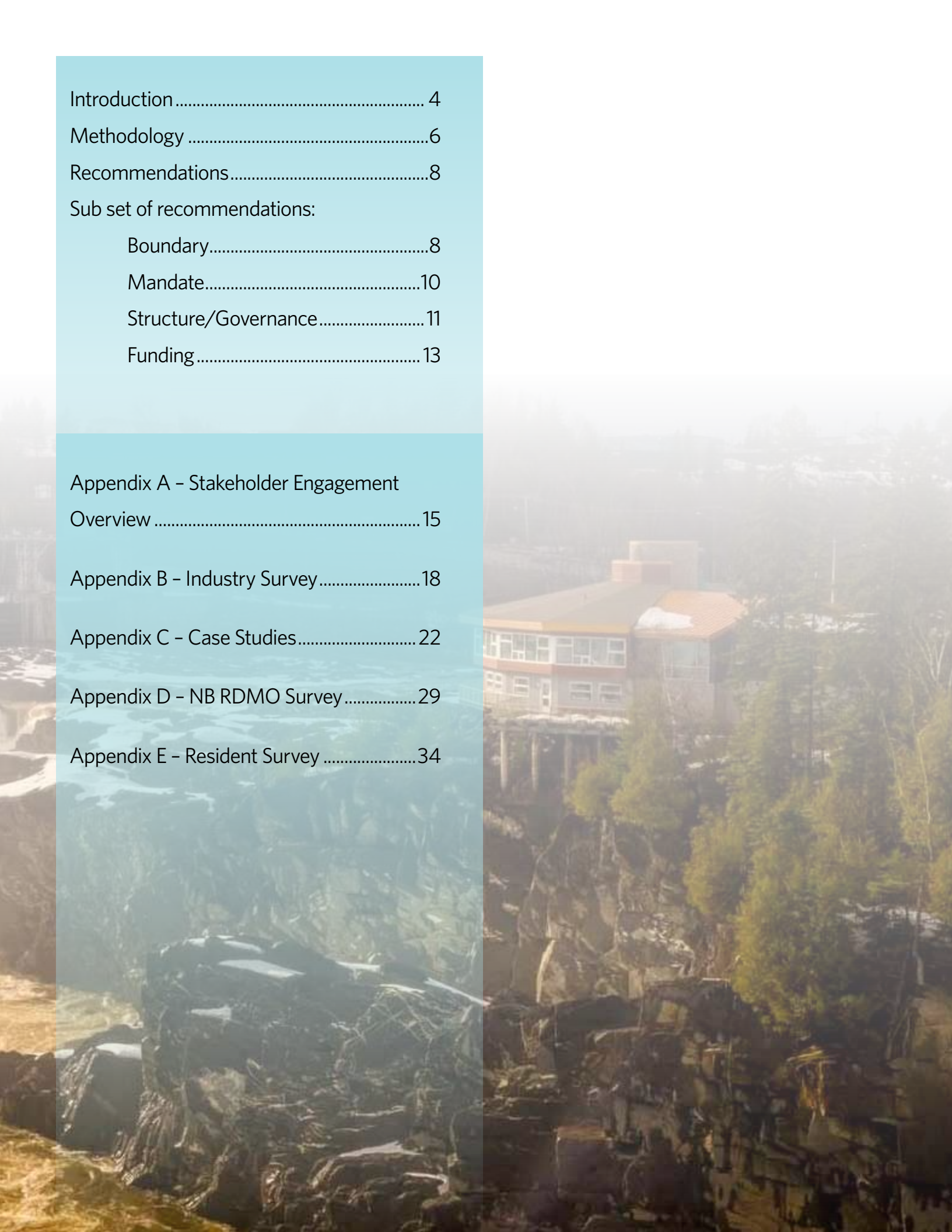
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Introduction

The purpose of this project was to review the ten community's current and desired tourism strategies and consult with industry and key stakeholders to determine how best a Regional Destination Marketing Organization (RDMO) could function and deliver regional tourism services to sustainably grow the visitor economy for the region.

The ten communities included in the project are indicated in the chart below, noting the contact who served on the Working Committee established for the project. Justine Waldeck, Perth-Andover, chaired the committee.

Working Committee

Bath	Barb McIntosh
Canterbury	Susan Patterson
Centreville	Andrea Callahan
Florenceville-Bristol	Bobbie O'Donnell
Grand Falls	Josée Gagnon
Hartland	Gaby Mann
Nackawic	Pam Fogarty
Perth-Andover	Justine Waldeck
Plaster Rock	Jan Greer
Woodstock	Tobi Pirie



In 2005 the region defined contracted Dr. Laurel Reid and associates to deliver a strategic plan for tourism. The plan included forty-three recommendations addressing target markets and marketing, positioning, and branding, tourism products and experiences, and tourism organizations and partnerships. The ten communities rallied around the strategic plan, implementing the recommendations over a two-year period with success. Upon the completion of the tasks, the communities continued to work collaboratively; however, without a renewed plan and dedicated regional staff the collaboration ended.

Currently, this region of New Brunswick is the only area without a RDMO resulting in various challenges leading to the need for this project.

It should be noted that while the services of a destination marketing organization are quite prescriptive there are regional nuances that need to be considered. Additionally, regions ebb and flow as to the investment of human and financial capacity into certain deliverables of a RDMO's at start-up and over the evolution of the organizations and region's maturity.



What is the role of a regional destination marketing organization?

A regional destination marketing organization (RDMO) promotes a town, city, region, or country to sustainably increase the number of visitors. It promotes the development and marketing of a destination, focusing on group sales, tourism marketing, and services.

Methodology

The following methodology was utilized to reach the recommendations in this report.

Community Assessments

Met virtually with each community to gain an understanding of the previous regional tourism committee including benefits and challenges, current and future levels of investment, staff and funding dedicated to tourism, tourism opportunities and barriers, opportunities for regional collaboration, what impact the municipal reform will have, desired deliverables of a regional tourism association and potential contribution.



Industry & Stakeholder Engagement

The goal was to ensure everyone was provided an opportunity to participate in the engagement process and to gather as much data as possible. To that end there were four ways to participate; in person group sessions, virtual session, online surveys, and one-on-one interviews.

The communities were provided with suggested communications and were responsible for promoting and inviting industry and stakeholders to the different means to engage. Bremner & Associates contacted those identified for one-on-one interviews to arrange convenient times.

- Conducted three (3) in person industry and stakeholder sessions and one (1) virtual industry and stakeholder session with a total of 28 participants
- Conducted online survey for industry and residents (482 responses)
- Conducted online survey for best practices for New Brunswick RDMO's (10 responses)
- Conducted one-on-one virtual interviews with:
 - Fredericton Tourism, Stacy Russell, and David Seabrook
 - Tourism Heritage & Culture, Rita Godbout
 - Tourism Heritage & Culture, Darren Hanscomb
 - Envision Saint John: The Growth Agency, Paulette Hicks
 - Tourism Edmundston (OTEM), Joanne Bérubé Gagné
 - Woodstock First Nations, James Paul
 - Woodstock First Nations, Terri Paul Thiffault
 - Neqotkulk Tourism, Brad Sappier

See Appendices for summary data on stakeholder and industry engagement.

Case Studies

Two similar regions were identified due to their size, location and recognized success in regional tourism development and promotion, the Chaleur Region in New Brunswick, and South Eastern Ontario. A desktop review of each along with one-on-one virtual interviews were conducted from the lens of identifying their formula for success, challenges faced and overcome, brand positioning, governance, funding, and structure.

Local Governance Reform

The province of New Brunswick is undergoing local governance reform and as such desktop research was conducted and this topic was included in all engagement and interviews. Additionally, communication with the transition lead for RSC #12 occurred for information and clarification.

Recommendations

Boundary

While this project was independent of the local governance reform currently occurring in New Brunswick, it was a topic that was referenced in all interviews and engagement sessions.

It was evident throughout the consultation that from a boundary, funding, and governance perspective, following the boundaries of the local governance framework was going to be a critical consideration for the proposed RDMO.

RECOMMENDATION

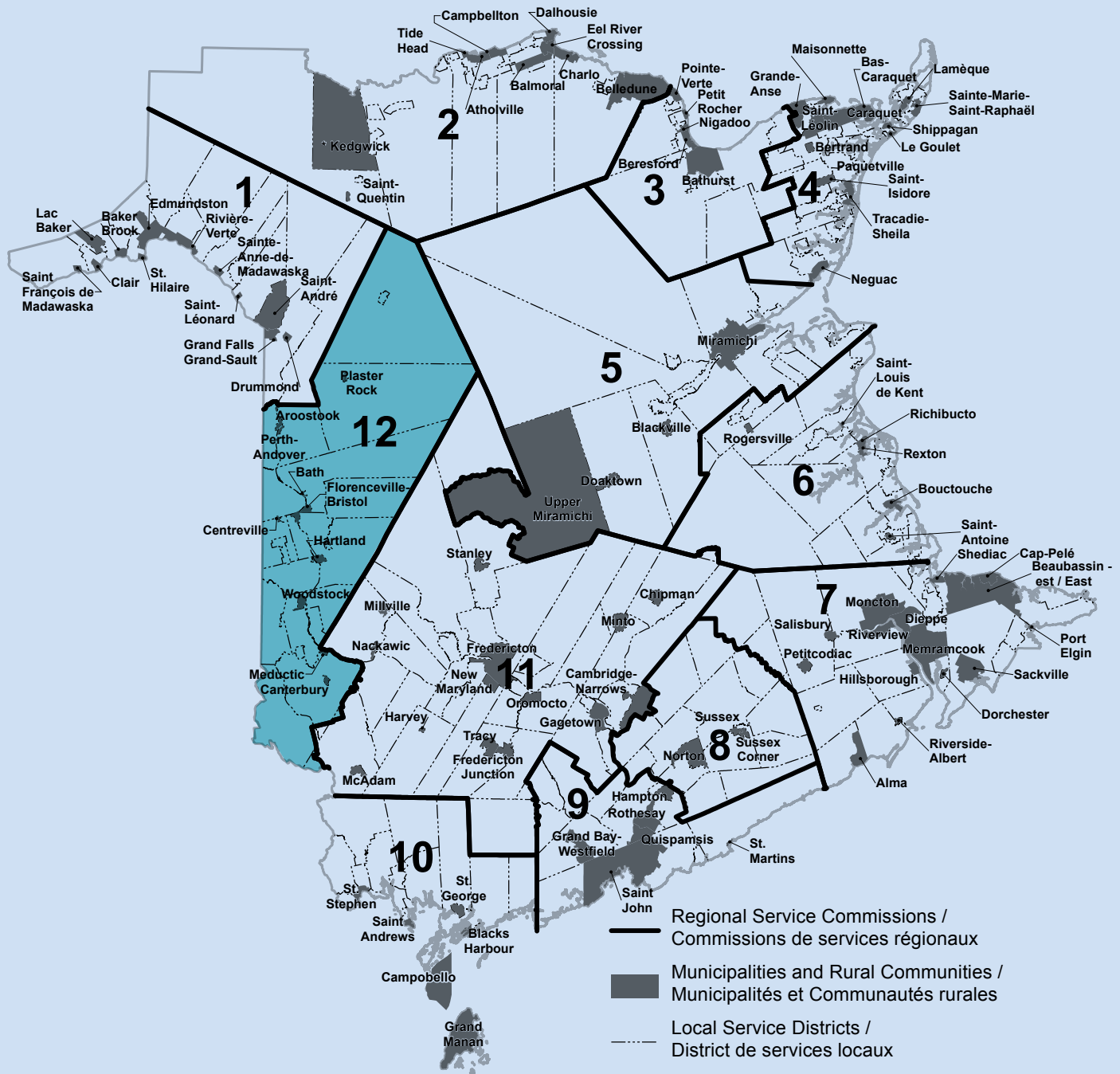
The boundary for the River Valley RDMO should coincide with the boundaries of the proposed Regional Service Commission #12.

This means there would be eight communities from this project included: Bath, Canterbury, Centreville, Florenceville-Bristol, Hartland, Perth-Andover, Plaster Rock, and Woodstock.



Within the recommended boundary there are over 160 self reported direct tourism businesses (accommodations, campgrounds, attractions, restaurants and events) who will benefit from a RDMO.

This means that Grand Falls would be a part of the RDMO for RSC #1 and Nackawic would be part of the RDMO for RSC #11. This does not preclude collaboration on specific partnerships or initiatives in the future as visitors do not see governmental boundaries. However, from a governance, funding, and boundary perspective this serves all communities best.



Map modified from: <https://www2.gnb.ca/content/gnb/en/corporate/promo/local-governance-reform/path-forward.html>

Mandate

At the time this report is being finalized, the local government reform is in a fluid situation as it relates to identifying which entities will be responsible for delivering certain streams of tourism. It is assumed there will be three levels of delivery:

1. Tourism, Heritage & Culture
2. Regional Service Districts (RSCs)
 - RSC's can deliver directly
 - Contract to a third party
 - Or Contract to a municipality
3. Local communities

This report is focusing on the second tier of delivery, the one required at the RSC level. This is the level that a RDMO will engage in the provincial structure being proposed.

The mandate of a regional destination marketing organization (RDMO) is to promote the region to sustainably increase the number of visitors. It promotes the development and marketing of the region, focusing on group sales, tourism marketing, experience or product development and services.

The degree to which a RDMO is involved in each of the core services often depends on the region. In the case of the Upper River Valley the recommendation is:

- Strategic planning
- Experience/Product Development
- Marketing
- Group Sales (as directed by the strategic plan)

This assumes local communities will be responsible for; tourism services such as visitor services, local events, managing and maintenance of tourism infrastructure.



Structure/Governance

The RDMO could be structured in one of three ways:

- 1) Internally as a function of RSC #12
- 2) An independent not for profit entity, contracted as a third party by RSC #12
- 3) Internally as a function of one of the municipalities within RSC #12

Based on the research conducted the recommendation is number two, an independent not-for-profit entity, contracted as a third party by RSC #12.

The not-for-profit entity would be governed by an **Advisory Board of Directors** comprised of 7-9 individuals from the following stakeholder groups:

- Accommodation Sector (2) *
- Attractions (1)
- Food & Beverage (1)
- Festivals & Events (1)
- First Nations (1)
- At Large (2) **
- Regional Service Commission (1)
- CEO of RDMO, ex officio

**Two, ensuring different types of accommodation providers have representation.*

***At large, to fill skill set needs, other tourism stakeholders, enabling flexibility as the entity matures and grows.*

These board positions should be filled with consideration of geography, diversity, and skill sets required throughout the evolution of the organization.

The Advisory Board should have:

- well defined roles
- policies and procedures (bylaws, financial protocols, conflict of interest, etc.)
- three-year terms (inaugural appointments will need to be staggered)
- a strong Chair who understands the tourism sector, ideally from multiple lenses
- a strategic/advisory role, not operational
 - this can be challenging in startup situations; solution is often forming working committees as required that can be chaired by a member of the Advisory Board but can be populated with non-board members

The first option, delivered internally by RSC #12 could also work. If this ends up being the course taken it is strongly recommended that a Tourism Advisory Committee (TAC) be struck to provide strategic direction to the tourism staff hired by RSC #12 and to the RSC itself. The TAC could take on the same attributes as noted above for the not-for-profit entity.

It is the opinion of Bremner & Associates that the third option, tourism services provided by a municipality would not have the same formula for success as the other two and should not be an option.



Funding

The funding recommendation is based on the research conducted and reflects a three-year implementation for a new RDMO. It is important to note that it will take three to five years to see the return on investment. This does not mean there will not be any visitor spend in the region during this time frame, but that the answer to “*What’s in it for me*” that all stakeholders will ask will take time to be fully realized. Industry and government stakeholders will need to be present, engage and focus on the strategic plan developed in year one to realize the full return on investment.

Three Year Budget				
	2023	2024	2025	Total
Revenue				
RSC	\$250,000	\$250,000	\$250,000	\$750,000
Tourism Levy	\$0	\$120,167	\$126,175	\$246,342
Total Revenue	\$250,000	\$370,167	\$376,175	\$996,342
Expenses				
Human Resources	\$160,000	\$168,000	\$176,400	\$504,400
Strategic Plan	\$50,000	\$0	\$0	\$50,000
Branding	\$0	\$25,000	\$0	\$25,000
Marketing	\$40,000	\$107,167	\$126,275	\$273,442
Product Development	\$0	\$30,000	\$31,500	\$61,500
Research	\$0	\$10,000	\$10,500	\$20,500
Group Sales	\$0	\$30,000	\$31,500	\$61,500
Total Expenses	\$250,000	\$370,167	\$376,175	\$996,342
NET:				
	\$0	\$0	\$0	\$0

The following summarizes the recommended budget:

Revenue

RSC – \$.01 of the tax base in RSC #12 represents approximately \$264,000 annually. Based on research of RDMO's \$250,000 annually is minimal investment for a region this size.

Tourism Levy – the calculation is based on information received from Tourism, Heritage and Culture and the Conference Board of Canada on occupancy rates for the region (34%), approximate number of units for the region (477), and average room rate (\$116) as of April 2022. The levy is currently not collected in the region, and it will take approximately one year to be implemented. Based on research, the standard is for the levy to be split amongst the local municipalities and the RDMO, thus the amount shown is 50% of the anticipated revenue with a 5% increase in year three.

Calculation of Tourism Levy:
[(477 units X \$116 avg room rate X 365 days)]
X 3.5% = \$240,334.54

Expenses

Human Resources – represents an Executive Director and one other full time staff member

Strategic Plan – critical to success is a three-year strategic plan, outsourced in year one

Branding – scheduled in year two post strategic plan

Marketing – minimal in year one during strategic planning, ramping up in year two and three

Product Development – support for programs that spark product development, it is not intended to directly deliver experiences or products

Research – both case studies emphasized the importance of local visitor research

Sales – based on strategic plan recommendations, implementation of a sales strategy for Travel Trade, Sport, Meetings & Conventions and/or Leisure.

It should be noted that both the Atlantic Canada Opportunities Agency (ACOA) and the department of Tourism, Heritage and Culture have project-based funding and programs available for RDMOs. Connecting with both agencies throughout the development and start-up phase should occur.



APPENDIX A

STAKEHOLDER ENGAGEMENT OVERVIEW



90-minute virtual sessions were held with 9 of the 10 communities:

Perth-Andover Village of Centreville Florenceville-Bristol Destination Nackawic Hartland
Plaster Rock Town of Grand Falls Town of Woodstock Village of Bath

Four stakeholder sessions were held, three in person and one virtual

Tuesday, June 28 | 6:30 pm – 8:00 pm

Venue: River Valley Civic Centre

Communities: Perth-Andover,
Plaster Rock & Grand Falls

10 participants

1. Eric M. Ouellette, P.Eng., President Zip Zag Canada
2. David Raines, Councilor, Town of Grand Falls
3. Josée Gagnon, Tourism Coordinator,
Town of Grand Falls
4. Rita Godbout, Tourism Heritage & Culture, NB
5. Gilles Beaulieu, Valley Chamber of Commerce
6. Judith Thériault, President, Grand Falls Potato Festival
7. Justine Waldeck, Village of Perth-Andover
8. Carol Brooks, Village of Perth-Andover
9. Jane Staples, MLA Margaret Johnson
10. Heidi Baird, Larlee Creek Hullabaloo

Wednesday, June 29 | 10am – 11:30 am

Venue: Western Valley Multiplex in
Centreville. Communities: Florence Bristol,
Bath, Centreville

10 participants

1. Bobbie O'Donnell, Town of Florenceville-Bristol
2. Jane Staples, MLA Margaret Johnson
3. Nancy Whyte-McCauley, Councillor,
Town of Florenceville-Bristol
4. Naith Baulkaran, Amsterdam Inn & Suites
5. Andrea McAloon Callahan, Village of Centreville,
6. Jennifer Stead, Andrew & Laura McCain Art Gallery
7. Jon MacDonald, Camp Shiktehawk
8. Tammy Kirkland, Potato World
9. Barb McIntosh, Bath
10. Vicky Perez, McCain

Wednesday, June 29 | 1pm – 2:30 pm

Venue: AYR Motor Centre, Gallery Room

Communities: Woodstock, Hartland, Nackawic, Canterbury

7 participants

1. Christie Kennedy, Best Western Plus Woodstock
2. Chelsea Gullison, Best Western Plus Woodstock
3. Joanne Barrett, Carleton County Historical Society
4. Susie Patterson, Village of Canterbury
5. Tobi Pirie, Town of Woodstock
6. Robert Stokes, resident Woodstock
7. John Carson, River Valley ATV Club

Wednesday, July 6 | 6pm – 7:30 pm

Virtual, Zoom Communities: All

1 participant

1. Gaby Mann, Town of Hartland



Why did previous RDMO not work?

- *Lack of clear mandate and focus, no bylaws/constitution, confusion on what was being done regionally versus municipally, dual hats*
- *Number of municipalities felt they were not getting ROI*
- *Was 100% municipal driven*
- *Was not someone's sole focus, wearing too many hats*

Common Challenges

- *Lack of restaurants (and understanding they are part of the tourism sector)*
- *Lack of accommodations*
- *Succession planning for signature events*
- *Pulling travellers off the highway (preplanning/marketing)*
- *Labour shortage (housing for employees, various levels, outward migration of youth, challenges with immigration)*
- *Concern about funding new RDMO*
- *Same conversations repeatedly, what are we doing*
- *Knowing who our customers are and what they want (especially the other 9 months of the year)*
- *Destination driven versus Event driven, what are the experiences that we are missing*

Common opportunities

- *Implement the Tourism Marketing Levy (with education)*
- *Increase year-round offerings (winter products and experiences)*
- *Who is our ideal client, high value guests?*
- *Trails, self-propelled and motorized*
- *Outdoor Adventure*
- *River access/experiences (fishing, boating)*
- *Lakes*
- *Agritourism*
- *Regionally, stronger voice, better communication, longer stays*
- *Culinary opportunities*
- *Promotion*
- *Marketing*
- *Leveraging buying power, such as hiring videographers, drone operators, photographers*
- *Coordinate data collection for the province*
- *Use data to measure successes/failures and trends*
- *Meeting with other people in the region, idea exchange, best practice sharing etc. organized networking*
- *Travel Trade, Sport Tourism, Meetings & Conventions, how can we attract these markets*
- *Accelerator programs for private ownership, entrepreneurship (that address identified gaps for target market(s))*
- *Compliment versus compete*
- *Coordinated education of front line and community members (experience knowledge as well as value of tourism)*
- *No membership fees, everyone should be a part of the RDMO*
- *Packaging, themed itineraries*
- *Better communication and representation with Tourism, Heritage, and Culture*

Local Governance specific

- *What is the tax impact going to be?*

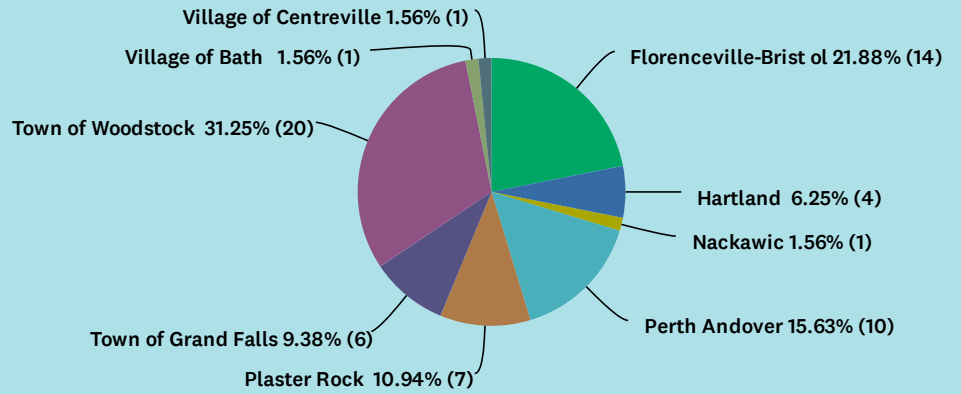
APPENDIX B

INDUSTRY SURVEY



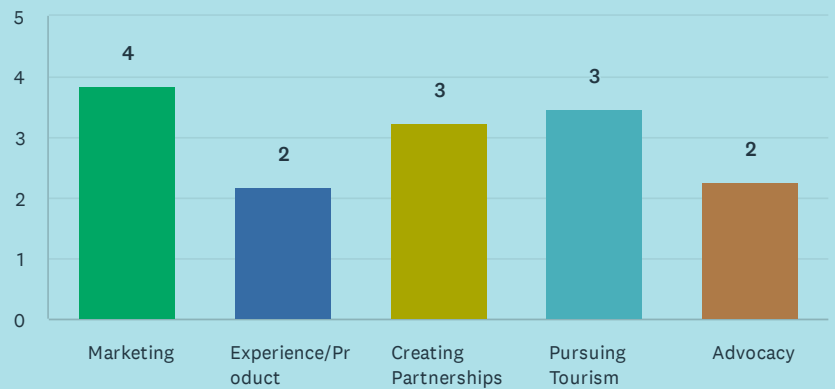
What community do you live in and/or operate a tourism business in?

Answered: 64 Skipped: 0



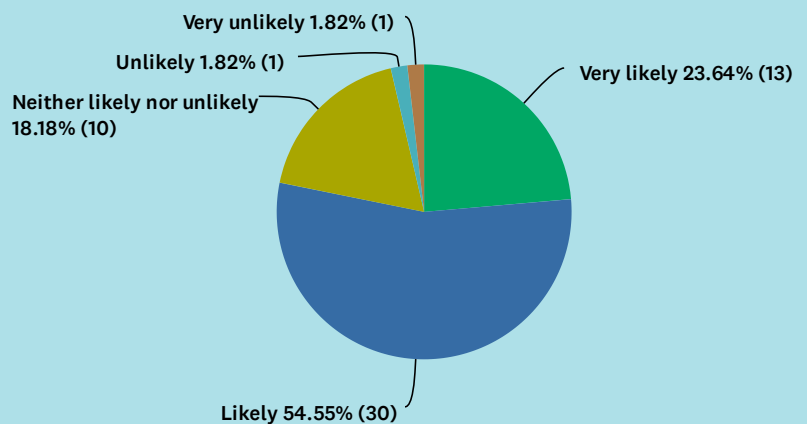
If there was a Regional Tourism Association for the River Valley rank the following services according to how you feel they would help grow your business?

Answered: 55 Skipped: 9



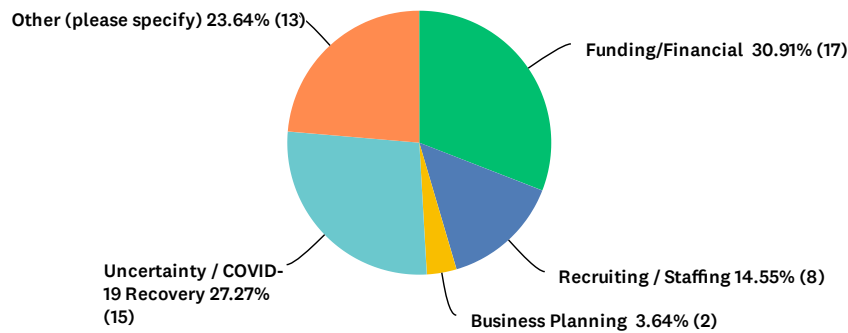
Do you think a Regional Tourism Association for the River Valley could help grow your business?

Answered: 55 Skipped: 9



What's the number one problem facing your business today?

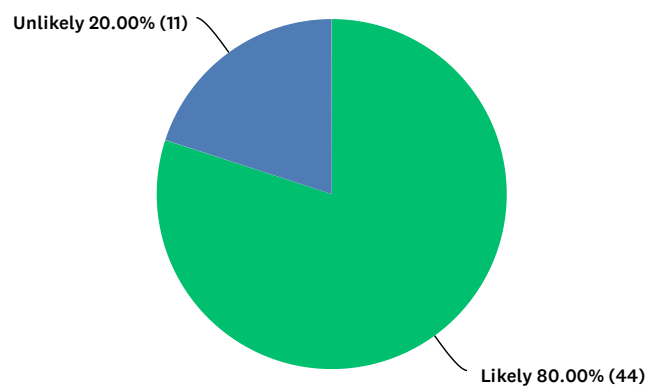
Answered: 55 Skipped: 9



Other = all of the above, infrastructure, marketing and communication

How likely are you to be involved with a Regional Tourism Association? (i.e. committee work, cooperative marketing, package development, etc.)

Answered: 55 Skipped: 9





APPENDIX C

CASE STUDIES



Chaleur Region

Shirley de Silva, Director | Mylene Doucet, Tourism Coordinator

702 Principale Street, Unit 2, Petit Rocher, NB E8J 1V1 (506) 542-2688 info@tourismchaleur.ca

Population: approx. 36,000

Eight Communities: Belledune, Pointe-Verte, Petit-Rocher, Nigadoo, Beresford, Bathurst, Pabineau First Nation, Local Service Districts. This reflects current situation, will move to three communities, Bathurst, Belle Baie, and Belledune plus local service districts post local governance reform.

Number of operators represented: 130 operators/festivals

Paid membership: No, no cost

History

Organization was created under Chaleur Regional Service Commission (CRSC) in 2017. The municipalities in the region started talking about positioning the region to have just one voice in 2015. Their model is being used as an example for current local governance reform.

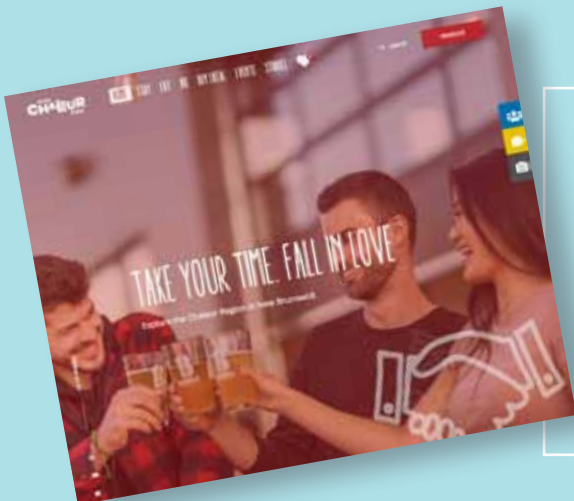
Governance

Tourism services are delivered under the CRSC. Tourism Advisory Committee is currently comprised of one person from each municipality. Consideration is underway to move to a skill based, industry represented Tourism Advisory Committee that also takes into consideration geographical representation.

Staffing

Started with one full time staff in 2017, another was added in 2018 representing two full time, dedicated staff for tourism with support from the CRSC. Currently, economic development and tourism are being combined.

Items such as campaign management, creation of ads, social ad management, photography, video, graphic design, and other core skills are outsourced.



<https://www.tourismchaleur.ca/>



<https://www.facebook.com/tourismchaleurtourism/>

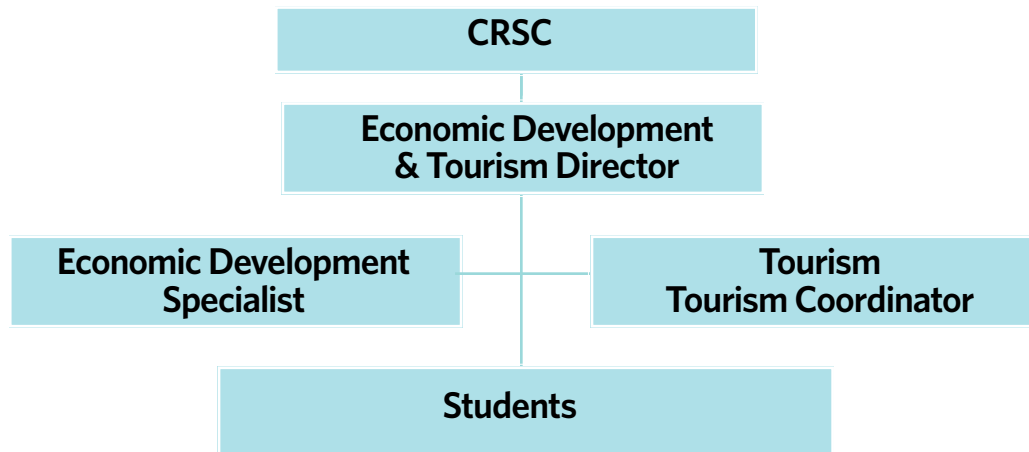


<https://www.instagram.com/tourismchaleurtourism/>



https://www.youtube.com/channel/UCeGiA-_JFK4akRKlhdbYKOA

Organization Chart



Funding

Funding comes from the CRSC and was divided equally at the time of inception. Original budget was approx. \$150,000. The CRSC had planned to add a second resource and to expand the promotion section; therefore, the budget was increased to \$300,000 in the second year and has remained stable for the past three years.

Note: COVID funding was received from Destination Canada via Province of New Brunswick and ACOA funds were secured as well. This was in addition to the \$300,000 annual budget. There is potential for other funding opportunities with the implementation of a municipal levy.

Challenges faced and overcome

Initially, moving from “what’s in it for me” to the “what is good for one is good for all” was a challenge; however, agreement and support from mayors and councils helped to overcome this challenge.

Are we receiving our return on investment on Tourism Chaleur versus the municipality doing their own tourism marketing and promotion? Even with support, this is a constant question that they are asked. They always need to be at the ready, proving their worth.



To overcome this, they are focusing on improved internal communications. “We don’t brag enough, ensuring municipalities and industry are aware of what we are accomplishing. We do a good job of promoting our industry but not ourselves.” Increasing frequency of presentations and updates to municipalities and industry versus waiting to be invited will address this challenge. It is interesting to note they are also going to consider presentations to the voting public through presentations to social clubs and other community organizations.

Brand positioning

Corporate branding and messaging were outsourced and completed in 2018. It is still fresh and relevant with no plans to change or update.

Take Your Time. Fall in Love. Explore the Chaleur Region in New Brunswick.

The first strategic plan is currently under development which will further the brand positioning by identifying the high value guests and target markets ideally suited for the region as well as identify any gaps in experience offerings required to attract them and have them stay longer.

Key Performance Indicators

Started local surveying in 2021 and doing again in 2022 with students. In conjunction with the data from the Province of New Brunswick, this data helps them demonstrate what they deliver is having a positive impact on visitation to the region. It also enables them to explore future possibilities based on relevant data to the region.

Words of Advice

Communication is key!

Have a strategic plan out of the gate so you have goals and know how to achieve them.

Encourage the thought process to move forward as one entity as opposed to multiple individual ones.

Leave personal agendas at home and put on your regional hat.

Continuously dream.

South Eastern Ontario

Bonnie Ruddock, Executive Director | Region 9 Regional Tourism Organization

829 Northwest Road, Suite 403, Kingston, ON, K7P 2N3 613.329.2753

bruddock@region9tourism.ca RTO internal facing website (Industry): <https://rto9.ca/>

Population: approximately 300,000

Visitor Revenue: 2019, 8.1 million

Ten Communities: Gananoque,
Prince Edward County, Bay of Quinte,
Brockville, Frontenac County, Kingston,
Lennox & Addington, Cornwall,
1000 Islands, and SDG's,

Number of operators represented:
10,000 plus.

Paid membership: No, no cost

History

Region 9 Regional Tourism Organization (RTO9) was incorporated in October 2010 after a study conducted by the provincial government of Ontario concluded regional tourism organizations were the path forward for success in the visitor economy. There are eleven RTOs in Ontario, all who have the same guidelines with five main pillars of delivery in a contract with the province: marketing, product development, tourism investment attraction, workforce development and partnerships. The degree to which each of the eleven RTOs focus on each of the five pillars varies.

Governance

RTO9 is governed by a permanent industry-led Board of Directors who have extensive experience in the tourism sector. They look to their Board for strategic guidance, policy development, fiscal approval, and active engagement.

Current Board composition: 14 positions, 5 executive positions, 1 at large, 7 regional and an Advisor to the Board who is ex officio and always occupied by the provincial government.

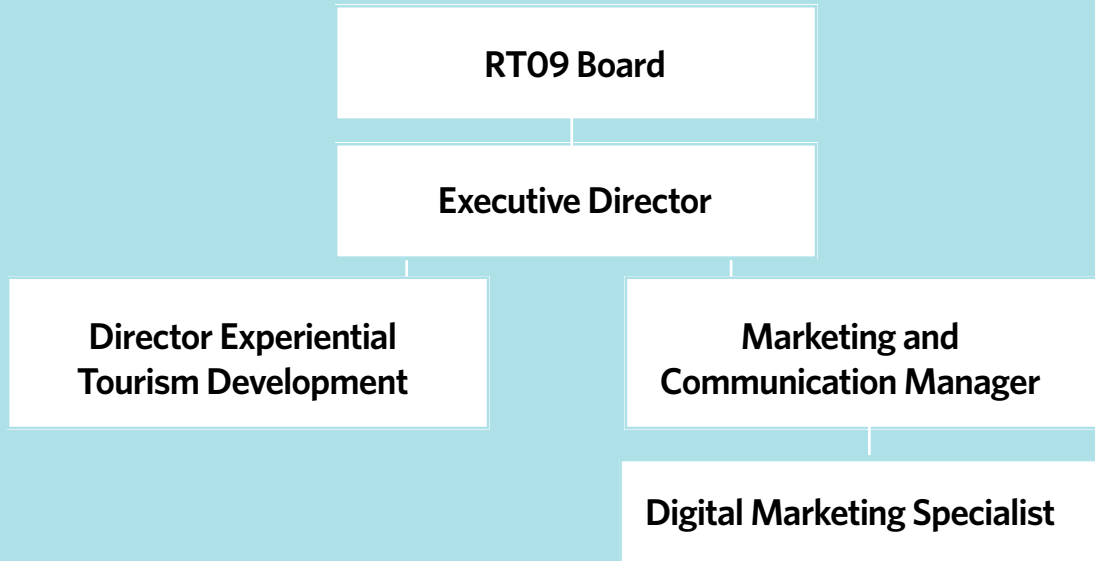
Currently going through a board composition exercise and early indication is they may change to a skills-based board, having industry sectors, and reducing the number of positions. Consideration may even be given to having people from outside the region depending on initiatives.



Staffing

Within the first few months of operation, RTO9 had three full time staff. Recently, digital media delivery was brought inhouse bringing total staff to four.

Items such as research, agency of record, coding and programming are outsourced.



Funding

There are eleven RTOs in Ontario who collectively receive approximately \$30-33 million annually from the Ministry of Tourism, Culture, and Sport. Each RTO receives a base amount of \$50,000 and the remainder is divided based on previous year visitor statistics.

The \$30-33 million comes from HST revenues. The destination marketing fee (4%) is separate and is given directly to municipalities who then provide fifty percent of the DMF to RTO9. The municipalities then use the remaining fifty percent for their own DMO's, visitor services and tourism infrastructure.

RTO9 currently receives \$1.3 million from both revenue streams.

It was noted funding is always a challenge, it has been reduced by 500K over the years. It is hard for some of their destinations to receive more money from their municipalities and therefore they focus on research to demonstrate the ROI on investment in tourism. It is the role of RTO9 to educate ministers and mayors, with the data.

Challenges faced and overcome

Collaboration was a challenge in the beginning as operators and destinations often saw each other as competitors. Demonstrating to them how working together could help everyone is what the RTO focused on. For example, they brought four major boat cruise operators together for an award-winning campaign. They had never worked together before (for over 100 years) and the success of the campaign showed them and others how the RTO could increase their sales through collaboration.

Having industry look at things from the visitor's perspective is how the RTO changed mindsets. A visitor doesn't see boundaries or competitors.

Brand positioning

South Eastern Ontario
(Rebranded 3 years ago)

No tag line

Each community has a slide on landing page of website, Unwind in 1000 Island and Gananoque, Be Delighted in Prince Edward County, Adventures in SDG Counties, Journey in the Bay of Quinte, Be Whimsical in Brockville, Wonder in Frontenac County, Indulge in Kingston, Escape to Lennox & Addington, Explore Cornwall, Gateway to 1000 Islands and Rideau Canal Waterways.

Key Performance Indicators

For RTO9 there are two major KPI's: a good ROI and businesses that are growing. This is achieved through leveraging partnerships, experience development & marketing.

Words of Advice

If you truly want to bring visitors to your area, take all the politics out and really focus on the visitor and the businesses and how you can help them grow.

Always look at it from the visitor's perspective, always remember who you are doing this for.

RND = Rob and Duplicate, ask for help, don't always recreate the wheel.



<https://southeasternontario.ca/>



<https://www.facebook.com/SouthEasternOntario/>



<https://www.instagram.com/southeast.ontario/>



<https://www.youtube.com/user/thegreatwaterway>



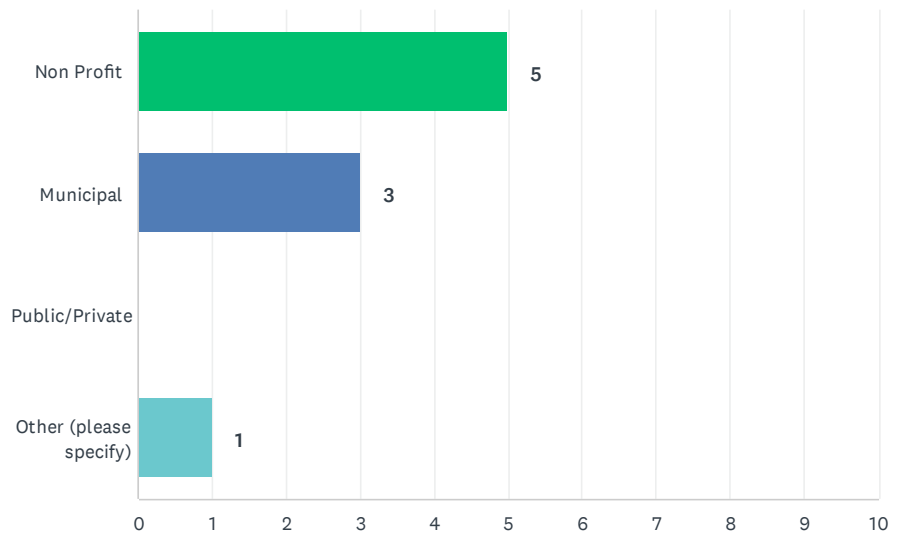
APPENDIX D

NB RDMO SURVEY



Which of the following best describes the organization?

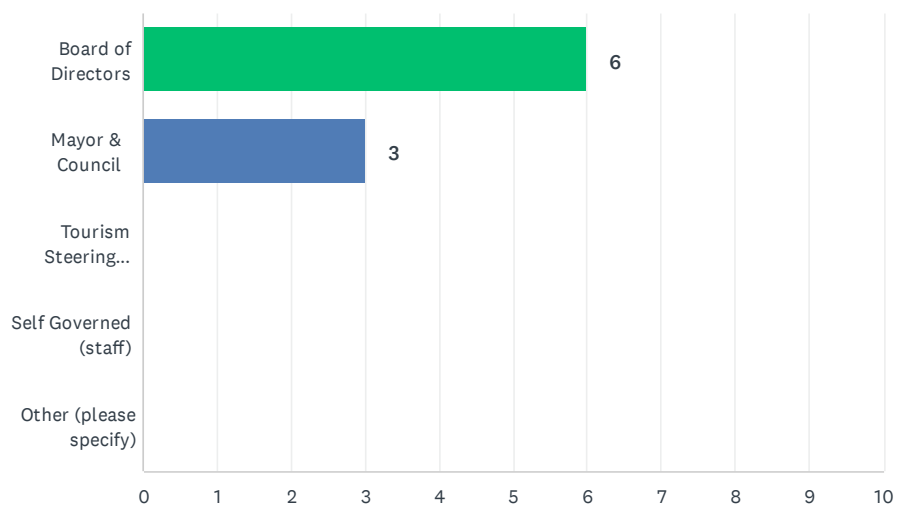
Answered: 9 Skipped: 0



Other = RSC

Which structure best describes the governance of the organization?

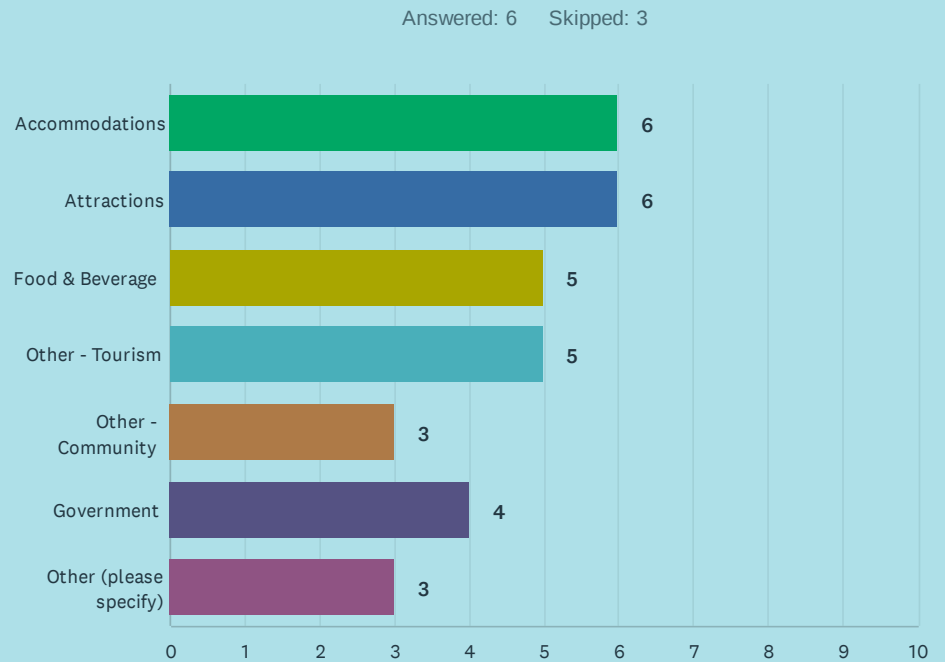
Answered: 9 Skipped: 0



Other = RSC

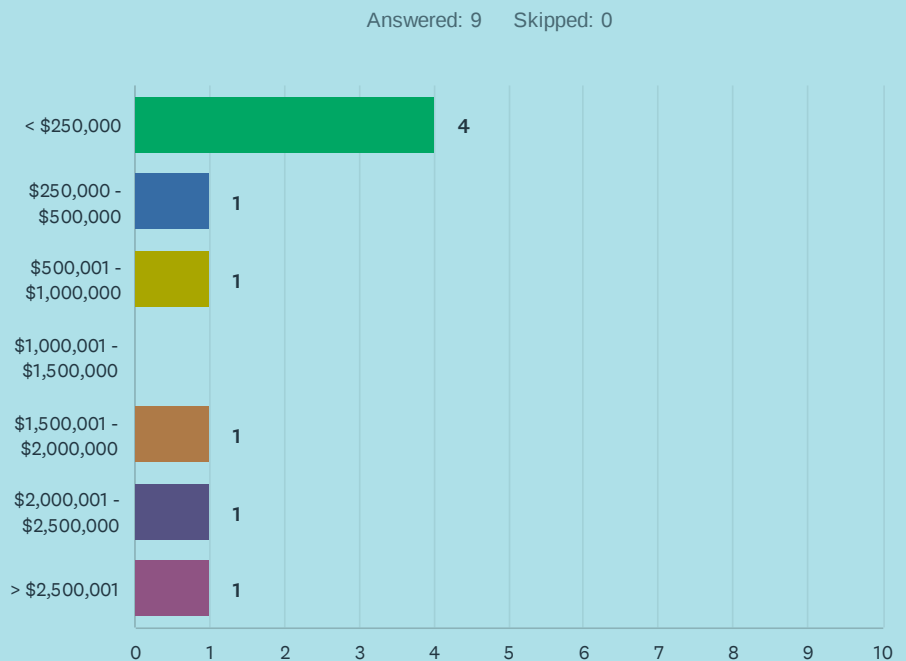


Please indicate which stakeholders are represented on your Board of Directors. Check all that apply.



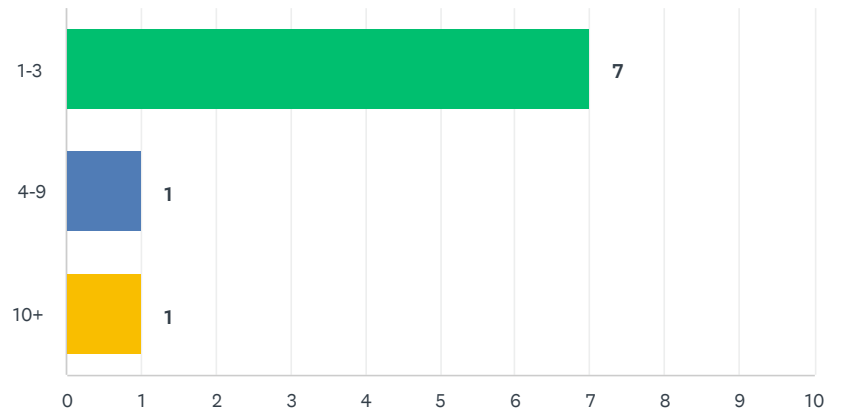
Other = Events, municipality, other types of accommodation, i.e., campgrounds

Which of the following best describes the budget of the organization? (excluding staff/personnel)



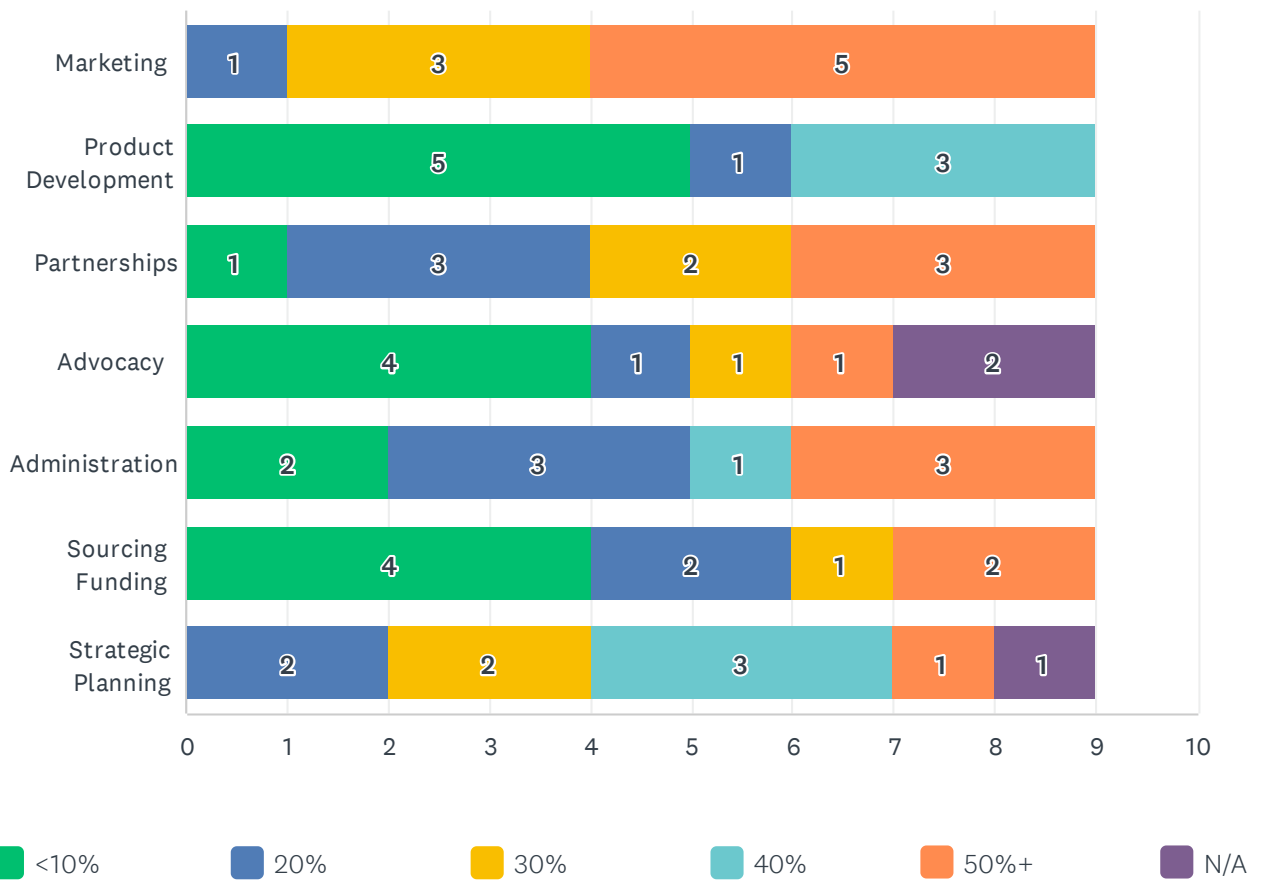
How many full time staff does the organization employ?

Answered: 9 Skipped: 0



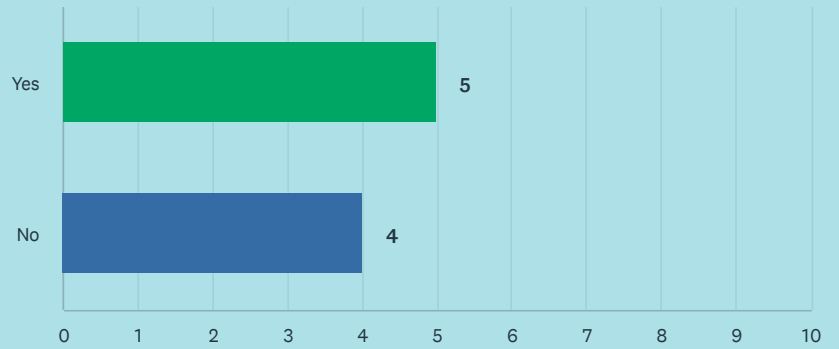
On average, what percent of the organization's time is spent on the following deliverables?

Answered: 9 Skipped: 0



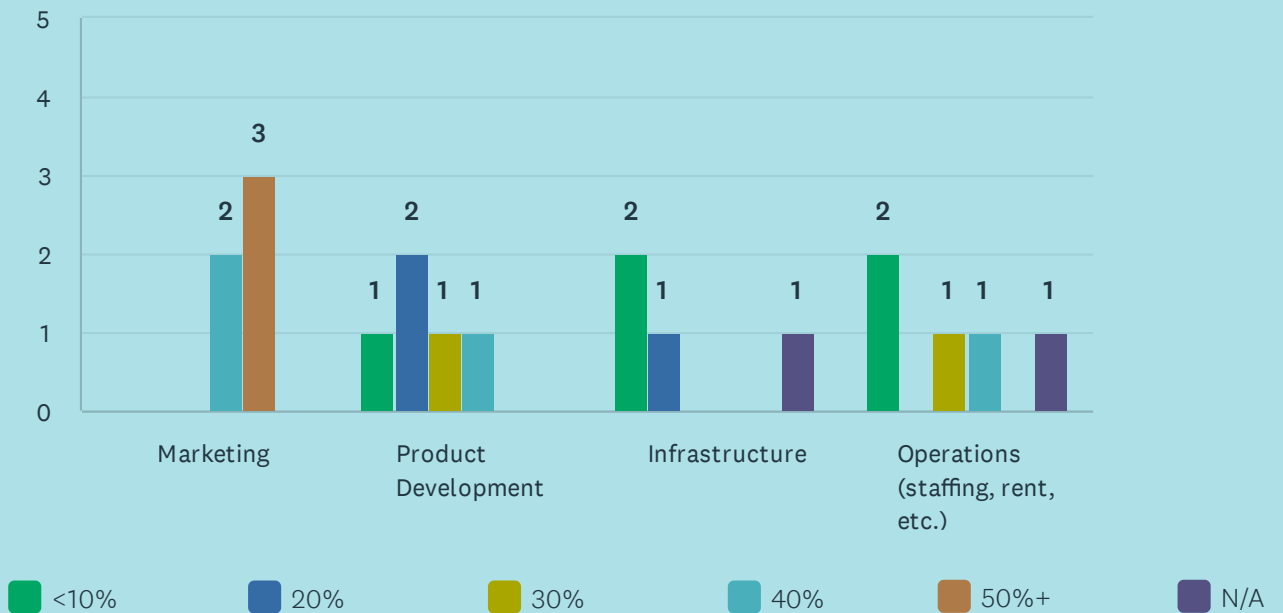
Does your region collect the tourism levy?

Answered: 9 Skipped: 0



Approximately, what percent of the tourism levy is spent on the following?

Answered: 5 Skipped: 4



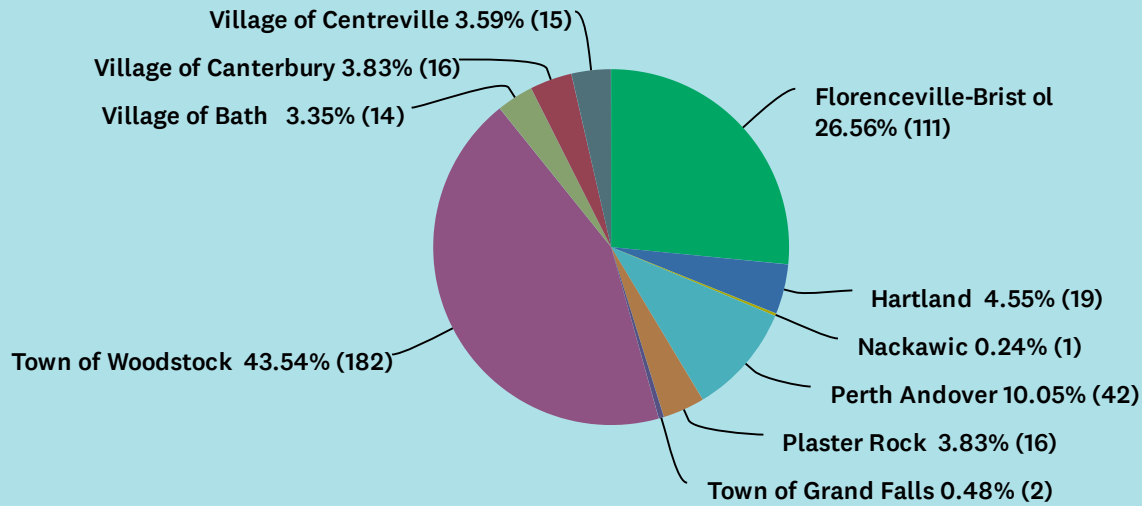
APPENDIX E

RESIDENT SURVEY



What community do you live in and/or operate a tourism business in?

Answered: 418 Skipped: 0

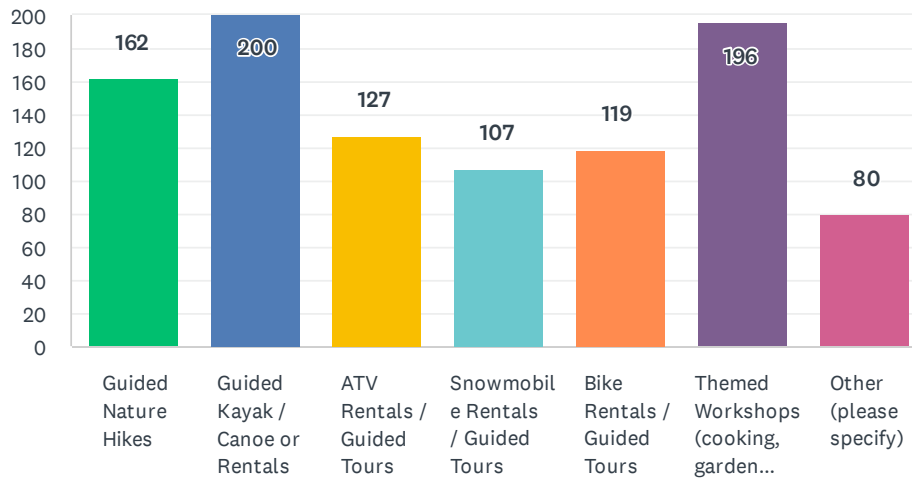


What do you recommend to visitors when they ask what to see and do in your community or in the River Valley (Grand Falls to Nackawic)?

lakes art gallery Connell Park trail system community events waterfront Outdoor boat
 great Kayaking Big axe Nackawic etc bridge Potato World local Heartland covered bridge
 see potato chip factory restaurants Kings Landing Hartland Bridge
 Downtown Woodstock Boardwalk enjoy Covered Bridge Potato house
 Florenceville world longest covered Go Bridge Big Axe
 Grand Falls Gorge walking tour market Farmers Market
 walking trails Moonshine Creek Visit murals
 Falls Grand Falls Museum
 Meduxnekeag Trails beautiful Grand Falls
 Bridge Potato Chip Potato World zip line
 Woodstock views
 longest covered bridge drive hiking
 activities trails Farm Market river Hartland
 Hartland Covered Bridge area
 hiking trails Train walk Boardwalk Cafe
 Covered Bridge Chip Maggie Falls
 Covered Bridge Potato Museum falls covered bridge Big Gorge
 Bridge Chip Factory waterfalls Florenceville-Bristol Big Axe water
 Maliseet Trail Mount Carleton Meduxnekeag local restaurants park
 Woodstock walking Saint John river Hartland longest covered
 covered bridge Hartland worlds largest axe Connell House
 AYR motor Center brewery Center golf Perth Andover canoe s Nackawic valley
 festival Beechwood Dam recommend canoe kayak Shiktehawk trail Fishing

What types of activities would you participate in if they were available in your community?

Answered: 311 Skipped: 107



local etc workshops Theatre activities historical art
 boat tour river bike music waterfront tours
 rentals events CONCERTS festival fun day adults
 outdoor guided

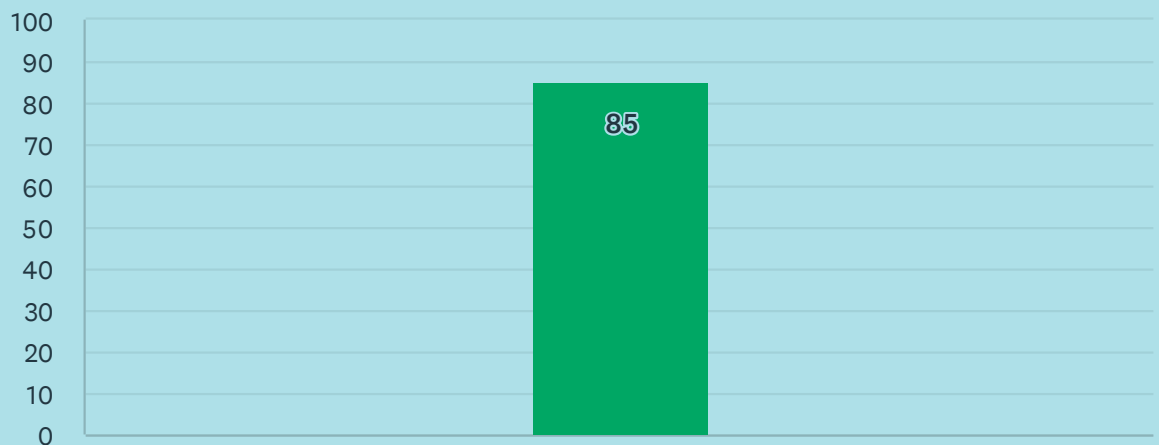


What words do you use to describe your community to your friends and family who live away?

welcoming slow paced nice charming living oriented family views Boring come people
good safe great place live lots Beautiful scenery river lovely great pretty
peaceful country community much friendly clean
Quiet picturesque beautiful friendly welcoming Small kids
rural retire quaint area Small town laid back relaxing
place raise family scenic vibrant town outdoorsy quite village activities Gorgeous
nature scenery valley Woodstock Farming

Overall, I think tourism is good for my community?

Answered: 310 Skipped: 108



On a scale of 0-100%, with 316 respondents the average selection was an 85% agreement rate with the statement.