



Heart's Content Community Development Corporation

Cruise Ship Feasibility Assessment

April 19, 2025

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## Acronyms

ACOA	Atlantic Canada Opportunities Agency
CAS	Consultant Advisory Service
CBDC	Trinity Conception Community Business Development Corporation
CBSA	Canada Border Security Agency
CLIA	Cruise Lines International Association
DDP	Destination Development Plan
DFO	Department of Fisheries and Oceans
DIET	Department of Industry, Energy and Technology
DMO	Destination Management Organization
DTCAR	Department of Tourism, Culture, Arts and Recreation
EOI	Expressions of Interest
HA	Heart's Content Harbour Authority
HCCDC	Heart's Content Community Development Corporation
LCEN	Legendary Coasts of Eastern Newfoundland
MOA	Memorandum of Agreement
NL	Newfoundland and Labrador
PCA	Pat Curran + Associates
SCH	Small Craft Harbours
SOW	Scope of Work
SWOT	strengths and weaknesses opportunities and threats analysis
TC	Transport Canada
TDVAA	Tourism Destination Visitor Appeal Assessment
USP	Unique Selling Proposition
VIC	Visitor Information Centre

## Executive Summary

For the past number of years, the Heart's Content Community Development Corporation (HCCDC) has been carrying out community improvements in anticipation of the designation of the Heart's Content Cable Station as a UNESCO World Heritage Site. One of the activities being considered is the potential of Heart's Content becoming a cruise destination. Preliminary work has begun on assessing security, logistics, berthage, and shore tendering requirements.

In late January 2025, Pat Curran + Associates (PCA) Inc. was contracted by HCCDC to complete a feasibility assessment of the potential for positioning Heart's Content as a cruise destination. The assessment was intended to provide a rationale for investment by the HCCDC and others including the Town of Heart's Content, the Provincial Departments of Tourism, Culture, Arts and Recreation (DTCAR) and Industry, Energy and Technology (DIET) and the Atlantic Canada Opportunities Agency (ACOA) in positioning Heart's Content as a cruise destination. This report is a summary of the findings from that assessment.

The emphasis with PCA's engagement was on research, consultation and a jurisdictional scan, and reflected the value HCCDC placed on stakeholder engagement. The agreed scope of work (SOW) for the project identified five to seven (5-7) interviews to be completed, however PCA completed 12 interviews prior to finalizing the key findings report. PCA completed a limited best practices/jurisdictional scan to identify best practices and approaches in other ports. The ports considered included Red Bay, Norris Point, Corner Brook, Woody Point and St. Anthony, including L'Anse Aux Meadows. The document review involved a deep assessment of current plans, studies, policies and any other supporting documentation and resources and references cited are reflected in Section 6 below.

Provincially, 2023 was a record-breaking year for the cruise industry with seventeen (17) ports across the province welcoming 116 cruise ship arrivals, a 32% increase from the previous year. Close to ninety thousand (88,584) passengers visited in 2023, many for the first time. Cruise NL forecasted 124,000 passengers for 2024 from 144 ship calls across 13 ports in the province. The cruise industry made a direct contribution of \$14 million to the provincial economy in 2023.

Internationally, cruise travel is increasing in North America with 18.1 million in 2023, reaching 107% of 2019 levels with 31.7 million passengers sailing. By 2027, cruise is forecast to grow to nearly 40 million passengers. Cruise has rebounded more quickly from the impacts of COVID than other tourism sectors. Expedition and exploration are the fastest-growing cruise itineraries being sailed, increasing by 71% from 2019 to 2023. Importantly for an emerging tourism destination like Newfoundland and Labrador, more than 6 in 10 of those who have taken a cruise indicate that they have returned to the destination, generating return visits for longer long-based holidays after their cruise.

The province's Department of Tourism, Culture, Arts and Recreation (DTCAR) and the regional destination management organization Legendary Coasts of Eastern Newfoundland (LCEN) do not consider cruise development to be a significant priority for development, in great part because of the limited economic

benefits. In 2023 cruise passengers accounted for 13.14% (69,100) of all visitors to the province yet expenditures of cruise passengers was just 1.23% (\$7.4 million) of all tourism expenditure. It should be noted however that the DTCAR figures do not include per vessel and per passenger port and security fees, so the actual expenditures are higher. Cruise is not identified within the province's 2020 tourism development plan, *Uncommon Potential*, it is not featured in the Eastern region's 2014 Eastern Destination Development Plan or in the Baccalieu Trail Tourism Development Plan of 2019. From the perspective of marketing, both DTCAR and LCEN have steered away from cruise, leaving leadership on cruise marketing to CruiseNL and individual ports and communities.

The comparison of the ports within the jurisdictional scan revealed a number of interesting points. For the most part there is commonality in the service offering and most ports use tender operations versus shoreside offloading. Rates per passenger range from a low of \$5 to \$30 while port security fees are between \$1,000-\$3,000, depending on the size of the ship. All ports require Transport Canada clearance as an occasional use port and no Canada Border Security Agency clearance is required unless it is the primary port of entry for visitors. Each port maintains 2-5 certified security personnel, depending on the ship size and port.

Cruise partners affirmed that both Cruise NL and Cruise Atlantic Canada are appropriate partnerships for the HCCDC to develop, although not all niche ports in Newfoundland and Labrador, including Norris Point for instance, maintain a membership. There is a process to enable entry into the cruise market and that it may take some time, up to five (5) years, to engage a port's first cruise ship.

Limited dock infrastructure in Heart's Content can be addressed through tendering as they do in most other ports in the province. The vessels carry their own tenders so there is no need for HCCDC to invest in tender vessels. Cruise operators will wish to know the time from anchorage to the tender dock and whether the port is sheltered. Ideally, the time from the vessel to the shore should be between 5-7, and no longer than 10 minutes.

A location known as Hopkin's Landing has been identified as the preferred site for a wharf and shoreside infrastructure and land acquisition is in the process. Preliminary design and notional costing has been completed for the installation of a floating dock. In terms of shoreside infrastructure, many of the other ports assessed utilize either existing buildings or temporary accommodations to meet requirements. HCCDC and the Town of Heart's Content have prepared a preliminary design for the building and site.

Best practice from other areas indicate a notional time in port of between six to ten (6-10) hours for each ship call or an average of eight (hours). Allowing tender offloading and onloading, there is a window of 4-6 hours for shore-based activity programs, whether centered in Heart's Content, or in other communities within a reasonable catchment area.

Activities in other ports generally include a formal welcome to the port. Some ports feature musical performances in the secure area or just outside. Most ports provide an opportunity for vendor space.

Often the dockside area is the location for pick-up and drop off for multiple tours. Heart's Content is centrally situated on the eastern side of Trinity Bay with ready access to communities north or south along Route 80, or to communities on the western side of Conception Bay east along Route 74. This allows for multiple touring loops for visitors to Heart's Content, all within the notional touring timeline noted above. Ultimately, a tour operator(s) will determine an excursion program that features attractions and activities that might be carried out within a tour package however, there are a number of activities and visitor experiences highlighted within the catchment area upon which a tour can be based.

On the basis of current visitation levels to major attractions, even modest cruise ship activity in Heart's Content can be expected to have a significant impact on increased visitation at these sites. With an estimated average of 775 visitors per ship call, and an estimated 75% of those visitors opting for shore-based tour and excursion activity, we can anticipate an increase of approximately 581 visitors to one or more of these attractions per ship call. It is difficult to imagine an increase in incremental visitation arising from any other activity on the scale of that from cruise in the Heart's Content area.

For these attractions, particularly the Wooden Boat Museum, the Cupids Legacy Center, and the Heart's Content Heritage Centre, all operated by not-for-profit organizations, the prospect of increased visitation from even one cruise ship would go a considerable way in addressing sustainability. Based on the comparative assessment of fee structures of area attractions in Table 7 below, a single cruise visitation would leverage additional revenues for each facility.

Cruise visitation in Heart's Content is a feasible development option, provided HCCDC can finalize land acquisition, including the adjacent water lot, and enable the development of shoreside infrastructure, including a marginal wharf and a floating dock to enable tender operations.

## 1. Project Background

For the past number of years, the Heart's Content Community Development Corporation (HCCDC) has been carrying out community improvements in anticipation of the designation of the Heart's Content Cable Station as a UNESCO World Heritage Site, in conjunction with Valencia Island, Ireland. One of the activities being considered by HCCDC is the potential of Heart's Content becoming a cruise destination. Preliminary work has begun on assessing security, logistics, berthage, and shore tendering requirements.

In late January 2025, Pat Curran + Associates (PCA) Inc. was contracted by HCCDC to complete a feasibility assessment of the potential for positioning Heart's Content as a cruise destination. The assessment was supported by the Consultant Advisory Service (CAS) program of the Trinity Conception Community Business Development Corporation (CBDC). The feasibility assessment was to consider the following:

- Complete a scan of 4-5 other cruise ship destinations in Newfoundland and Labrador (NL) to determine best practice approaches
- Identify considerations on passenger servicing and logistics requirements, including pricing and local governance and administration
- Conduct a review of current Heart's Content and area visitation and how cruise ship activity might positively impact this visitation
- Assess current and potential visitor experiences in Heart's Content and the broader area to support a shore-based excursion activity

The detailed assessment was intended to provide a rationale for investment by the HCCDC and others including the Town of Heart's Content, the Provincial Departments of Tourism, Culture, Arts and Recreation (DTCAR) and Industry, Energy and Technology (DIET) and the Atlantic Canada Opportunities Agency (ACOA) in positioning Heart's Content as a cruise destination.

## 2. Consultation and Research Methodology

The emphasis with PCA's engagement was on research, consultation and a jurisdictional scan, and reflected the value HCCDC placed on stakeholder engagement.

### 2.1 Consultation and Research

The proposed scope of work involved several key aspects, including interviews, a jurisdictional scan and a detailed literature review. The following activities were carried out.

#### Interviews

HCCDC reviewed and approved targets for interviews and PCA Lead Consultant Pat Curran led the interview process. The agreed scope of work (SOW) for the project identified five to seven (5-7) interviews

to be completed, however PCA completed 12 interviews prior to finalizing the key findings report. A summary of complete interviews is provided in Table 1 below.

**Table 1 Interviews**

#	Name	Organization
1	Patti Ricketts/Glenda Simms	Corner Brook Port Authority & City of Corner Brook
2	David Coffin	DIET
3	Erin Kearsey	ACOA
4	Christa Norman	Cruise NL/City of St. John's
5	Chris Sheppard	Legendary Coasts of Eastern Newfoundland
6	CarolAnne Gilliard/Jeremy Harnum/Julia Penney	DTCAR
7	April Crocker	Town of Norris Point
8	Bob McCarthy	St. John's Port Authority
9	Keith Pike	Town of Red Bay
10	Colin Conrad	FK Warren
11	Malcolm Campbell	St. Anthony Port Authority
12	Sherry Avery	Town of Woody Point

## Jurisdictional Scan

PCA completed a limited best practices/jurisdictional scan to identify best practices and approaches in other ports. The ports considered are highlighted in Table 2 below.

**Table 2 Ports within Jurisdictional Scan**

Port
Red Bay
Norris Point
Corner Brook
Woody Point
St. Anthony (including L'Anse Aux Meadows)

## Literature Review

The document review involved a deep assessment of current plans, studies, policies and any other supporting documentation. Resources and references cited are reflected in Section 8 below.

## 2.2 Draft and Final Feasibility Assessment

The input from the interviews, jurisdictional scan and literature review are reflected in this draft feasibility assessment. We will present the draft assessment and findings to representatives of the HCCDC and finalize the assessment following input.

### 3. Cruise Overview

PCA assessed the significance of cruise and where it fits in overall regional and provincial tourism product development priorities .

#### 3.1 Cruise Visitation

The most recent statistics available on the cruise industry in Newfoundland and Labrador are from 2023. According to Cruise NL, 2023 was a record-breaking year for the cruise industry for the province, as well as in Saint-Pierre et Miquelon. Seventeen (17) ports across the province welcomed 116 cruise ship arrivals, a 32% increase from the previous year. Close to ninety thousand (88,584) passengers and over fifty thousand (52,614) crew members visited in 2023, many for the first time. The Port of Corner Brook also set a provincial record for the highest number of cruise passengers (40,948) in a single season among all ports in the province (Cruise NL, 2025). For 2024, Cruise NL forecasted 124,000 passengers and 53,000 crew members to visit, along with a further 14,000 passengers and 6,800 crew members in Saint Pierre et Miquelon. Cruise ship visitation for 2024 was projected at 144 ship calls across 13 ports in the province and 23 ship calls for Saint Pierre et Miquelon (Cruise NL, 2025).

#### 3.2 Cruise Trend and Market Potential

According to the Cruise Lines International Association (CLIA), cruise travel is increasing in North America with 18.1 million in 2023 compared to 15.4 million (17.5%) in 2019. Cruise travel reached 107% of 2019 levels in 2023—with 31.7 million passengers sailing. This compares to overall international tourism arrivals, which are 12% lower than 2019. By 2027, cruise is forecast to grow to nearly 40 million passengers (CLIA, May 2024). Simply put, cruise has rebounded more quickly from the impacts of COVID than other tourism sectors.

The ability to visit multiple destinations along with value for money are the top reasons cruisers love to cruise. Expedition and exploration are the fastest-growing cruise itineraries being sailed and the number of passengers sailing on expedition itineraries has increased 71% from 2019 to 2023. Accessibility is an increasing travel imperative, and today more than 100 accessible shore excursions are available in cruise ports of call. And 45% of cruise travelers booked an accessible shore excursion in the past year (CLIA, May 2024). More than 6 in 10 of those who have taken a cruise indicate that they have returned to the destination, generating return visits for longer long-based holidays after their cruise (CLIA, May 2024).

#### 3.3 Economic Impact of Cruise

There is some difference in perspective on the value of the cruise industry to the province. According to Cruise NL, the cruise industry made a direct contribution of \$14 million to the provincial economy in 2023 (Cruise NL, 2025). However, while significant, DTCAR views the net economic impact of cruise expenditure

to be limited. In 2023 cruise passengers accounted for 13.14% (69,100) of all visitors to the province yet expenditures of cruise passengers was just 1.23% (\$7.4 million) of all tourism expenditure (DTCAR, 2025). It should be noted however that the DTCAR figures do not include per vessel and per passenger port and security fees, so the actual expenditures are higher.

### 3.4 Significance of Cruise Within Provincial & Regional Tourism Development Priorities

DTCAR and the Legendary Coasts of Eastern Newfoundland (LCEN), the regional destination management organization (DMO), do not consider cruise development to be a significant priority for development, in great part because of the limited economic benefits highlighted above. Cruise is not identified at all within the province's 2020 tourism development plan, *Uncommon Potential* (DTCAR, 2020). Nor is it featured in the Eastern region's 2014 Tourism Destination Visitor Appeal Assessment (TDVAA), more commonly referred to as the Eastern Destination Development Plan (DDP) (Brain Trust, 2014) or in the Baccalieu Trail Tourism Development Plan of 2019 (LCEN, 2019). From the perspective of marketing, both DTCAR and LCEN have steered away from cruise, leaving leadership on cruise marketing to CruiseNL and individual ports and communities.

## 4. Jurisdictional Scan

### 4.1 Red Bay

Red Bay has a cruise terminal which is a refurbished fish plant with local vendor space, a performance area, and an exhibit on the Basque whaling station. They do not include a fee for the Parks Canada Visitor's Centre in their base price. There is a local tour company that runs tours to the Straits, including Lanse au Clare and Point Amour.

### 4.2 St. Anthony and L'anse Aux Meadows

St. Anthony and L'Anse Aux meadows has tendering capacity for cruise ships, and ready access to bunker and diesel fuel, fresh water, wastewater removal, stevedoring, piloting and other port operations and personnel, including security services. St. Anthony is in close proximity to the Grenfell Premises and a UNESCO World Heritage Site at L'anse Aux Meadows. Nearby trails offers vantage points to view coastline, seabirds, icebergs, whales and Fox Point Lighthouse (Cruise NL, 2025). Shoreside, they have a secure area with a Viking mascot and reception activities led by Town with an information booth within the secure area while vendors are based outside the secure area. Combined, the ports had 32 ship calls in 2024 and has 24 ship calls booked for 2025.

### 4.3 Norris Point

Norris Point has a marina/wharf owned by Small Craft Harbours (SCH) and operated by the local Harbour Authority (HA) and there are limited facilities, a reception area or amenities for those who just wish to go ashore. Cruise ships generally arrive late in September or early October, which is a challenge because most tourism-based businesses and operations are closed after Labour Day. Last year, there were no facilities with washrooms open. Most visitors who come ashore are going on tours around the Bonne Bay area.

### 4.4 Woody Point

Woody Point is located in the heart of Gros Morne National Park. It is the base for an emerging cruise activity and features shoreside amenities and access to the national park, listed as a UNESCO World Heritage Site. Woody Point is a Registered Heritage District and has a waterfront with many heritage buildings and four Registered Newfoundland and Labrador Heritage Structures.

### 4.5 Corner Brook

City of Corner Brook deals with shoreside activities while the Port of Corner Brook deals with operational considerations. Some of their cruises are dockside and some tendering. Corner Brook has ready access to bunker and diesel fuel, fresh water, wastewater removal, stevedoring, piloting and other port operations and personnel, including security services (Cruise NL, 2025).

### 4.6 Comparative Port Overview

A comparative overview of each of the ports considered is highlighted in Table 3 below. Key variables include numbers of ship calls in 2024, fee per visitor, fee per ship, number of security personnel, port configuration and shoreside facilities.

**Table 3 Comparative Overview of Ports**

Community	Red Bay	St. Anthony	Norris Point	Woody Point	Corner Brook
# of cruises	12 in 2024	32 in 2024	5 in 2024	15 in 2024	36 in 2024
\$/visitor	\$30*	\$10**	\$5	\$8.50	\$8.75
\$/ship	\$3,000	\$1,500	\$1,000	\$1,250	\$2,000
# of security	3	4-5	2	2-3	3-5
Port configuration	Tender	Tender	Tender	Tender	Tender and dock side
Shoreside facilities	Cruise terminal	Wharf	SCH Wharf	Floating dock	Wharf
*Includes access to interpretation center, performances and visitor area					

Community	Red Bay	St. Anthony	Norris Point	Woody Point	Corner Brook
**St. Anthony has a differential fee structure depending on the number of passengers. There is \$10/person charge for ship calls with over 200 passengers. Ship calls with less than 200 passengers are charged the ship rate.					

## 5. Considerations on Heart's Content as a Niche Cruise Destination

### 5.1 Engagement with Cruise NL and Atlantic Canada Cruise Association

The HCCDC maintains an associate membership in Cruise NL, and Cruise NL and the Cruise Atlantic Canada are working on an Atlantic niche port strategy. Heart's Content has been engaged in the planning process, attending focus groups and planning session and engaging with other niche port partners throughout the region.

Cruise partners affirmed that both Cruise NL and Cruise Atlantic Canada are appropriate partnerships for the HCCDC to develop, although not all niche ports in Newfoundland and Labrador, including Norris Point for instance, maintain a membership. There is recognition among Cruise NL leadership over the enthusiasm that HCCDC has brought to the process in the recent past. While the HCCDC maintains a membership in Cruise NL at \$300/year, in time, it may wish to expand its memberships to include Cruise Atlantic Canada at cost of \$500/year.

Cruise NL's purpose is to encourage cruise development with an emerging focus on niche port and are directly engaged in upcoming cruise trade shows including the Cruise Canada New England Symposium on June 9-11, 2025 in Halifax, Nova Scotia (see <https://www.cruiseconesymposium.com/en/index.aspx>) and Sea Trade Global on April 7-10, 2025 in Miami, Florida. (see <https://www.seatradecruiseevents.com/global/en/home.html>). Heart's Content is encouraged to attend the show in Halifax if possible. For 2025, Cruise NL is projecting over 100,000 passengers, with 140 ship calls in 25 ports, an increase over 2023 visitation (Cruise NL, 2025).

### 5.2 Market Opportunity

Cruise ship partners agree that there is a process to enable entry to the cruise market and that it may take some time, up to five (5) years, to engage a port's first cruise ship. Heart's Content will need to commit and be prepared to stay on it for an extended period. They will require a multiyear commitment of resources to support market development including industry association membership(s), marketing and co-lateral material development, and trade show attendance, notionally \$15-\$20K over the initial 3-5 years.

While market penetration and cruise attraction may take some time, Heart's Content must be ready in case they get a nibble in the meantime. They will need to have their pitch down pat and initially a modest investment in materials, including a description of the port, shoreside facilities and notional activities. A

simple flat sheet may be enough in the initial stages. This must include information on the port's USP, port characteristics (water depth, tendering capacity, time from anchorage to wharf etc.), local features and attractions and regional features and attractions, bounded by a 1-1.5 hour drive.

There is a specific opportunity in the adventure cruise market and a need to determine how to fit into the cruise itineraries. Heart's Content needs to determine their unique selling proposition (USP) – if it is UNESCO designation, then go with that. In the meantime, go with what is already in place. There is a need to determine how significant UNESCO designation is to the visitor, the cruise ship operator and the tour operators. For some funders, DIET in particular, evidence of market interest and a cruise booking may be a prerequisite for support.

### 5.3 Port Configuration and Shoreside Facilities

Limited dock infrastructure in Heart's Content can be addressed through tendering as they do in Red Bay, Norris Point, Woody Point, St. Anthony, L'Anse Aux Meadows and at times, Corner Brook. The vessels carry their own tenders so there is no need for HCCDC to invest in tender vessels. Cruise operators will wish to know the time from anchorage to the tender dock and whether the port is sheltered. Ideally, the time from the vessel to the shore should be between 5-7, and no longer than 10 minutes. HCCDC has completed design and notional costing for the installation of a floating dock.

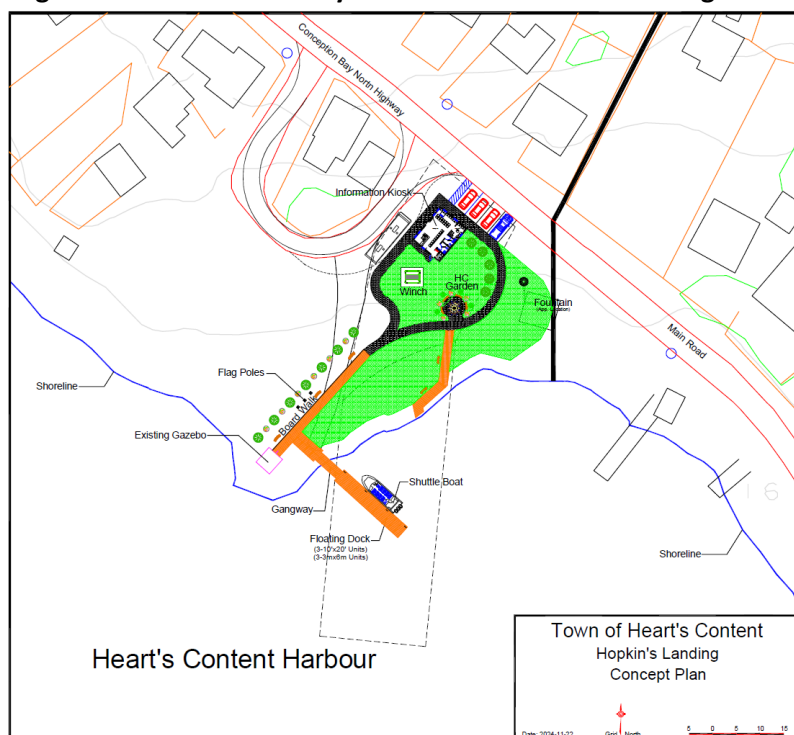
**Figure 1 Tender Dock and Visitor Centre Location**



HCCDC is seeking support to develop marine and shoreside infrastructure including a marginal wharf and floating dock to accommodate tender operations and also, construct a center to meet shoreside visitor orientation requirements.

A location known as Hopkin's Landing (see Figure 1 left) has been identified as the preferred site for a wharf and shoreside infrastructure, and land acquisition is in the process.

**Figure 2 Preliminary Dock and Visitor Centre Design**



In terms of shoreside infrastructure, many of the other ports assessed utilize either existing buildings or temporary accommodations to meet requirements. Red Bay for example has converted a former fish plant into a visitor center while Corner Brook sets up reception activities dockside.

HCCDC and the Town of Heart's Content have prepared a preliminary design for the building and site (see Figure 2 left).

On an interim basis, HCCDC may wish to try to reach accommodation with the HA for access to their wharf facilities for vessel tendering.

## 5.4 Compliance with Canada Border Services Agency and Transport Canada

Niche ports are generally not the primary port of entry to Canada so there is no necessity for the port to provide access to Canada Border Security Agency (CBSA) staff unless the vessel wishes to clear customs in the port.

The Marine Transportation Security Regulations provide the rules of conduct for different types of marine facilities in Canada. An Occasional-use Marine Facility can interface with vessels up to 10 times per calendar year and with Transport Canada's (TC) this designation is a requirement. It is likely that this level of designation will align with Heart's Content's anticipated ship call activity in the initial years. To become a certified occasional-use marine facility, a port has to meet a number of criteria including:

- a security assessment of the facility
- access to trained and certified Occasional-Use Marine Facility Security Officers
- written security procedures for the facility
- a Letter of Compliance from Transport Canada following a review of procedures and staffing (Transport Canada)

Other niche ports have between 2-5 people trained up, with training available online or in-person. The costs of providing security are an accepted charge for cruise operators.

## 5.5 Shoreside Activities/Welcoming Communities

Activities in other ports generally include a formal welcome to the port, with visitors often being greeted by a mascot. In St. John's, a Newfoundland dog welcomes visitors while in St. Anthony, a Viking greets them. After clearing security, visitors are generally directed to local visitor guides, often volunteers, who act as ambassador. Some ports feature musical performances in the secure area or just outside. Most ports provide an opportunity for vendor space. Red Bay has a dedicated cruise terminal where visitors' clear security and are ushered led through an area featuring performers, crafts producers and other vendors and interpretation based on Basque whaling. Often the dockside area is the location for pick-up and drop off for multiple tours. In St. Anthony, it is common, depending on the size of the cruise ship and the number of passengers, for there to be 6-10 buses waiting to transport visitors to points of interest. The same is true for other ports.

Visitors are looking for free Wi-Fi and access to washrooms. Many visitors will purchase shore-based tours and excursions, generally sold on ship, and local tour operators will need to be engaged in developing a local and regional tour offering. For those not going on tours yet still coming ashore, Heart's Content must determine what a shore-based program of activities will look like. The real economic value is in monetizing this visitation and Heart's Content will need to determine what its capacity is to develop and sustain a shoreside offering. It might include access to the Cable Station and the new Heart's Content Heritage Centre, walking tours, performance, trails and hiking, local cuisine.

## 5.6 Fees

As noted in 4. above, there is some variation in the types of fees and rates, however they generally fall in two categories. The first is a fee/passenger. The second is a fee/ship. Red Bay charges the highest amount for both per passenger fees at \$30 and per ship fees rates \$3,000. Representatives of other ports indicate that they are likely under charging for both passengers and ships and port costs, while a consideration, fees do not appear to be a determining factor in whether a cruise ship decides to utilize a particular port or not.

## 5.7 Prospects for Public Investment in Cruise for Heart's Content

PCA determined the views of key funding partners on the prospects for public investment in cruise infrastructure and capacity building, assuming that a rationale for the investment can be provided.

### ACOA

For ACOA, investment in marine infrastructure is a challenge, in part because their contribution is generally limited to 20-25% of total project costs. Marine infrastructure is not cheap, and any project budget would likely require significant investment from ACOA, more in line with their capacity to go above 50% of total project costs depending on the project and the capacity of the sponsoring group. HCCDC is

finalizing land assembly at the proposed development site and ACOA will not be engaged unless the proponent has clear title to the property. Marine infrastructure such as wharves and slipways, in fact any development that impact on waterways, will trigger a more detailed environmental assessment and involve the Federal Department of Fisheries and Oceans (DFO) as part of the review process.

## DIET

For DIET, there is a need to build a significant rationale for investment, likely based on confirmation from a cruise ship or agent of a scheduled cruise visit. Like ACOA, investment in marine infrastructure is always a concern. From the perspective of shore-side assets, particularly a visitors' center, there are concerns over HCCDC's ability to develop and sustain a program of activities at the building, particularly during non-cruise days and during the off-season. There is also concern over property ownership and the relatively small property footprint. Likely conditions of support, or at minimum a rationale for investment, will include a significant movement toward UNESCO designation, a firm order from a cruise line on a ship visit and finally, the development of a program of activities that would engage the cruise visitor.

## 5.8 Organizational Capacity

Shoreside activities and responsibility for programming among niche ports vary considerably around the province. Operational considerations of the port are generally left to the port or local harbour or port authority while cruise visitor activities are often led by the town or other local coordinating group. In some ports, these activities are highly organized, in others, less so. In St. John's, Corner Brook, Red Bay and St. Anthony, the Town takes a lead role. In Norris Point, a more casual approach is taken with less focus on dockside reception activities and the Town's role is limited to distributing notice of the ship call to key stakeholders.

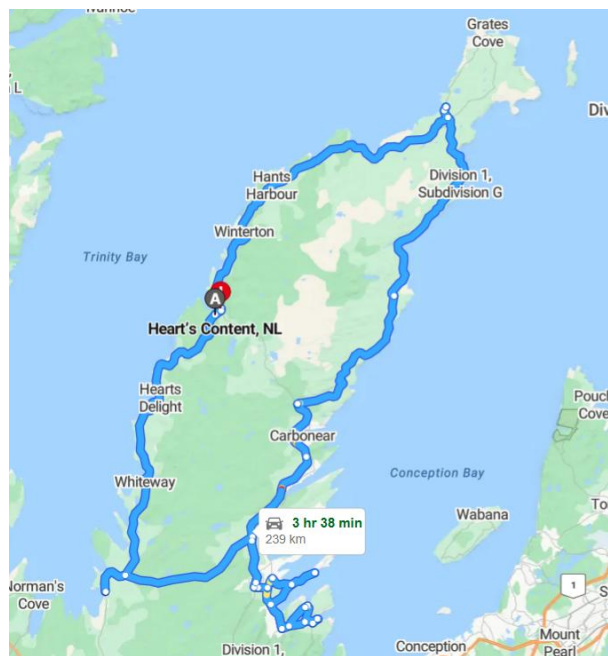
There is a need for a cruise champion in each port – it is often the Town and/or the Port Authority acting together but it is considered an absolute requirement. In most instances, and when done well, it takes a lot of volunteers to engage including greeters and guides. It also requires broader engagement of area vendors and performers who may be called on to engage with visitors.

HCCDC enjoys a strong working relationship with the Town and is best positioned to lead the development. It will require the engagement of multiple partners to craft an effective visitor program. In addition, it will need to establish relationships with local tour operators to facilitate an offering in the area.

## 5.9 Potential Program Activities

### Catchment Area

**Figure 3 Catchment Area**



Best practice from other areas indicate a notional time in port of between six to ten (6-10) hours for each ship call or an average of eight (hours). Allowing tender offloading and onloading, there is a window of 4-6 hours for shore-based activity programs, whether centered in Heart's Content, or in other communities within a reasonable catchment area. Based on the experience of other ports, the average tour duration is 3.5-4 hours, including a preferred maximum drive of 1 hour coming and going with 1.5-2 hours of activity within communities.

Hearts Content is centrally situated on the eastern side of Trinity Bay with ready access to communities north or south along Route 80, or to communities on the western side of Conception Bay east along Route

74. A map of the potential tour catchment area is provided in Figure 3 above. This configuration of roadways, along with Route 73 which connects the community of New Harbour in Trinity Bay with Spaniard's Bay in Conception Bay, allows for multiple touring loops for visitors to Heart's Content, all within the notional touring timeline of 3.5-4 hours noted above.

### Distances and Driving Times within Catchment Area

Relative distances and driving times from Heart's Content to other communities on the Baccalieu Trail are highlighted in Table 4 below.

**Table 4 Distances and Driving Times to Communities and Attractions**

Community	Distance (KMs)	Travel Time (Minutes)
Winterton	12	10
Victoria	17	13
Harbour Grace	31	26
Old Perlican	41	42
Dildo	44	39
Baie De Verde	47	56
Port De Grave	53	42
Cupids	56	47

## Attractions and Visitor Services within Catchment Area

Ultimately, a tour operator(s) will determine an excursion program that features attractions and activities that might be carried out within a tour package. There are a number of activities and visitor experiences highlighted with Table 5 below within the catchment area.

**Table 5 Attractions and Visitor Services**

Community	Attraction/Visitor Service
Heart's Content	Heart's Content Cable Station
	Mizzen Museum
	"The House of Commons"
	Hiking Trails
	Regional Arts Centre
	Lighthouse
	Rendell Forge
Winterton	Wooden Boat Museum
	Trinity Hall
Grate's Cove	Heritage Trails
	Rock walls
Baie De Verde	Baie De Verde Brewing Company
Carbonear	Sheila NaGeira Theatre
Harbour Grace	SS Kyle
	Conception Bay Museum
	Otterbury School House
Bay Roberts	Christopher Pratt Art Gallery
Port De Grave	Green Point Lighthouse
	Fishermen's Museum
Cupids	Cupids Legacy Center
	Cuper's Cove Plantation Provincial Historic Site
Brigus	Hawthorne Cottage National Historic Site,
	Stone walls and streets
	Architecture
Dildo	Dildo Brewing Company

## 5.10 Potential Impact of Cruise on Area Visitation

Visitation to the Baccalieu region is increasing and at the same time, there is an emerging emphasis on enhanced visitor experience. The region has been branded as the Baccalieu Coastal Drive and this in turn has enabled a greater focus on the region's collaborative potential. Despite these encouraging signs, there is more work to be done in fulfilling the region's fullest potential as a destination.

Current Visitation

The area has a number of well-developed attractions that complement cruise visitation and that would be part of a likely touring option for cruise visitors. Table 6 below highlights visitation at major attractions within the area (DTCAR, 2025).

**Table 6                      Visitation to Major Attractions**

Visitation to Select Sites	2019	2023	2024
Heart's Content Cable Station	5626	5514	6600
Wooden Boat Museum	3515	2858	2455
Cupid's Plantation	3768	2123	3151

Additionally, the Bay Robert’s Visitor Information Centre (VIC) reported 3,106 visitors from May to September 2024.

Potential for Increased Visitation

On the basis of current visitation levels to major attractions, even modest cruise ship activity in Heart’s Content is expected to have a significant impact on increased visitation at these sites. With an estimated average of 775 visitors per ship call<sup>1</sup>, and an estimated 75% of those visitors opting for shore -based tour and excursion activity, we can anticipate an increase of approximately 581 visitors to one or more of these attractions per ship call.

For the Heart’s Content Cable Station, one ship call could represent an 8.80% increase in visitation over 2024. For The Wooden Boat Museum, one ship call could represent an increased visitation of 23.66% over 2024. For the Cupid’s Legacy Centre and the nearby Cupid’s Plantation, one ship call could represent an increased visitation of 18.44% over 2024. This does not consider the impact of increased visitation among other attractions within the immediate Heart’s Content area, including the Heart’s Content Heritage Centre (formerly the Mizzen Heritage Museum) and possible entertainment activity at the Heart’s Content Regional Centre for the Arts. It is difficult to imagine an increase in incremental visitation arising from any other activity on the scale of that from cruise in the Heart’s Content area.

Building a Sustainable Attractions Base

For these attractions, particularly the Wooden Boat Museum, the Cupids Legacy Center, and the Heart’s Content Heritage Centre all operated by not-for-profit organizations, the prospect of increased visitation from even one cruise ship would go a considerable way in addressing sustainability. Based on the comparative assessment of fee structures of area attractions in Table 7 below, a single cruise visitation could leverage additional revenues for each facility.

<sup>1</sup> Based on 2023 visitation of 90,000 averaged across 116 ship arrivals, or 775 passengers/ship call.

**Table 7 Comparative Assessment of Fees**

Attraction	Adult	Incremental Revenue
Wooden Boat Museum	\$10	\$5,810
Cupids Legacy Centre	\$12.83	\$7,454
Heart's Content Cable Station	\$6	\$3,486

(Source – PCA, 2019)

## Building a Sustainable HCCDC

Supporting the sustainability of tourism infrastructure and anchor attractions is an important action item within the Province's updated tourism strategy, Vision 2026 (DTCAR, 2025). Cruise visitation would help sustain HCCDC, enabling it to continue to lead priority development activities in Heart's Content in readiness for UNESCO designation. Based on a port fee/ship call of \$1,500 and an average of 775 passengers/ship call @ \$10/passenger, one cruise visit has the potential to generate \$9,250 in gross revenue, less projected salary costs of \$575 for two (2) security staff and other expenses.

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