



***Tourism
Destination
Development Plan
for Yarmouth &
Acadian Shores:
Final Report
“Filling the Chairs”***

***Prepared for:
South West Shore
Development
Authority***

***Prepared by:
the Tourism Company***

February 2009





Notes to readers

In the interest of saving a few trees, this document has been formatted for 2-sided printing.

All of the photos in this report were taken in Yarmouth & Acadian Shores during May, June and July 2008.



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February 18, 2009

Mr. Larry Peach, M.A.
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**Re: Tourism Destination Development Plan For Yarmouth & Acadian Shores – Revised
Draft Final Report**

Dear Mr. Peach,

We are pleased to submit this Tourism Destination Development Plan for the Yarmouth & Acadian Shores Revised Draft Final Report. It incorporates changes we have made based on the very helpful review comments provided by a number of reviewers.

Yours truly,

J. Michael Robbins
Partner
the Tourism Company

Acknowledgements

This study was made possible with the generous funding support of:

- Atlantic Canada Opportunities Agency (ACOA);
- Nova Scotia Department of Tourism, Culture & Heritage; and
- Nova Scotia Office of Economic Development.

The Project Steering Committee was generous with their time and thoughtful with their comments, providing direction and guidance to the consulting team – thank you.

And without the strong support and assistance provided by SWSDA Tourism Division Staff, it would have been difficult for the consulting team to successfully complete the assignment – thank you.

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Executive Summary

The Yarmouth and Acadian Shores (YAS) tourism economy is in a period of transition from reliance on overnight stays generated by a favourable ferry schedule, to a destination chosen by travellers on the basis of the rich natural and cultural heritage-based experiences.

If all the product development initiatives recommended in this report are implemented quickly, supported by the Total Market Readiness Program (TMR) and effective destination marketing communications and sales promotion, substantial increases in the number of overnight visitors to the region will not happen overnight.

Steady yet modest annual growth is the likely scenario.

Few if any tourism destinations are without challenges in today's global market place. YAS is not an exception. In fact there are four key issues that need to be addressed for the region to get on a growth curve. These include:

- An insufficient critical mass of compelling experiences to attract and keep visitors in the region;
- An eroding accommodation base;

- Vulnerable transportation connections from New England; and
- Lack of comprehensive, relevant and timely market intelligence to measure tourism economy's performance and provide a sound information base for future marketing decisions.

The good news is that the region has many competitive strengths and assets. A few examples include:

- Compelling "stories" -- such as shipbuilding, sea captains, historic English and French settlement and co-existence, 19th century summer playground for the well-to-do, international tuna sport fishing tournaments, Nova Scotia's first tourism destination for U.S. residents -- ;
- Underutilized natural resources and a remarkable diversity of landscapes -- seacoast with beaches, bluffs, salt marshes and an island archipelago, to inland wilderness areas, rivers and lakes;
- Vibrant Acadian culture and historical roots;
- Yarmouth, a regional urban centre of retail, events, sports, entertainment,

culture, transportation and commercial fishery;

- A World Biosphere Reserve;
- Established coordination and collaboration in marketing among tourism stakeholders; and
- Strong leadership and staff support for destination development and marketing through the Tourism Division of SWSDA.

In crafting this long-term destination development plan, the consulting team travelled extensively throughout the region, reviewed volumes of data and reports, consulted widely, and listened carefully to tourism industry stakeholders. The result is a plan of six strategic initiatives that provides immediate, medium and long-term direction to guide industry stakeholders as they strive to transform YAS into:

- A Nova Scotia tourism destination that visitors **choose** to visit for leisure and business;
- A rich tapestry of tourism experiences with broad market appeal grounded in the region's **natural and cultural heritage**; and
- A diversified tourism economy that capitalizes, but is not dependent, on its **unique transportation links** to the New England States and Halifax.

First, to complement experiences that already exist and expand the critical mass, concentrated product development of 9 high potential experience markets is recommended. These include:

- Amateur sport;
- Art and craft;
- Automobile (and motorcycle touring);
- Coastal hiking;
- Cuisine;
- Historic sites and buildings;
- Meetings and retreats;
- Music and dance; and
- Ship and boatbuilding heritage.

Second, development and implementation of a short-term tourism industry stabilization program is recommended, to encourage continued operation and in some cases upgrading, of vulnerable but critical tourism infrastructure, particularly commercial accommodation.

Third, commitment by municipal partners to long-term funding of SWSDA's tourism industry support staff and activities is recommended.

Fourth, the development and ongoing maintenance of a program for the collection, analysis and distribution to industry

stakeholders of beneficial marketing intelligence, particularly visitor tracking research and advertising and promotion tracking, is recommended.

Fifth, the development and implementation of a transportation strategy is recommended, whose goal is to secure long-term ferry service and air links to New England.

Sixth, it is recommended that once a tapestry of diversified experience markets have been attracted, and high capacity transportation links from New England have been secured, the Yarmouth waterfront undergo an “extreme makeover” with a new ferry terminal as the centrepiece, and featuring recreation, entertainment, accommodation and retail elements.

Implementation of this plan will require tourism industry stakeholders to become engaged through numerous working groups lead and supported by the Tourism Division of SWSDA. It will also require a renewed emphasis by SWSDA on destination marketing activities, particularly marketing communications and sales promotion.

This is an ambitious plan. Some elements of it are bold. Some elements are less so. Together, they provide a road map for developing an expanded and sustainable tourism economy.



1. The Assignment

1.1 Background

The tourism economy of the study area – comprising the Municipality of Argyle (southern part), Municipality of Clare (northern part), Municipality of Yarmouth and the Town of Yarmouth (central part) – has experienced shocks and undergone significant change over the past four years.

In 2005, after a few years of gradually declining visitor numbers and hotel occupancy, the Scotia Prince announced discontinuation of its ferry service to and from Maine. Ferry traffic dropped by 50%, substantially reducing the number of visitors.

In 2006, a number of actions were taken in response to a deepening crisis in the regional tourism economy:

- The South West Shore Development Authority (SWSDA) hosted a regional Tourism Product Summit;
- The region's four municipalities (Argyle, Clare, Yarmouth and Town of Yarmouth) provided SWSDA with a tourism development and promotion mandate for the region;

- The region's four municipalities formally joined forces to create Yarmouth & Acadian Shores (YAS);
- SWSDA initiated the Total Market Readiness (TMR) and Acadian Product Development projects;
- A YAS Steering Committee was formed; and
- An accommodation sector Room Levy Committee was formed -- it hired Bristol Communications for a YAS branding exercise.

In 2007, the region experienced its third consecutive poor tourism season fuelled by changes to the CAT ferry schedule. During the year:

- An accommodation room levy was introduced in Yarmouth to generate additional funds for tourism marketing;
- The YAS travel region¹ was officially recognized by the province; and
- SWSDA launched the YAS Tourism Plan and YAS brand.

¹ Yarmouth & Acadian Shores was created by combining parts of neighbouring travel regions Fundy Shore & Annapolis Valley and South Shore.

In May 2008 SWSDA hired the Tourism Company to assist in preparing a long-term Tourism Destination Development Plan for YAS.

1.2 Purpose

As stated in the terms of reference the goal of the assignment was to **develop a long-term destination development plan for boosting tourism in the YAS region.**

Key desired outcomes from this work included:

- An analysis of global and regional tourism trends, and implications for the study area;
- Complete inventory and review of the accommodation product;
- Identification and prioritization of regional product development opportunities; and
- Analysis of the region and its potential for a star generator attraction(s) (core attraction).

1.3 Consulting Team

The diverse skills required for this assignment led the Tourism Company to assemble a team of specialist advisors, comprising:

- Mike Robbins, Partner, the Tourism Company (Toronto, Ontario) – expertise in tourism destination development planning;
- D’Arcy McKittrick, Partner, the Tourism Company (Peterborough, Ontario) – expertise in tourism destination development planning, feasibility studies and business planning;
- Chris Lowe, President Chris Lowe Planning and Management Group (Halifax, Nova Scotia) – expertise in business strategy and investment packaging;
- Cameron Hawkins, President Cameron Hawkins & Associates (Toronto, Ontario) – expertise in hotel, restaurant and event tourism;
- Dwight Hawkins, President Opus International Consultants (Fredericton, New Brunswick) – expertise in transportation planning/engineering;
- Laurel Reid, President Tourism Synergy Ltd (Saint John, New Brunswick)– expertise in sustainable destination planning and development;
- Jean-Guy Vienneau, Associate of Tourism Synergy Ltd. (Moncton, New Brunswick) – Acadian tourism planning and development: and

- Rachelle Richard-Collette, Associate of Tourism Synergy Ltd. (Moncton, New Brunswick) – sustainable economic development and Acadian tourism.

1.4 Work Plan

Work on this assignment was completed in four phases, as requested and outlined in the Terms of Reference.

The key areas of investigation covered under each phase included:

1.4.1 Phase 1 - Analysis of Tourism Trends and Market Potential

Activities included in this phase included, but were not necessarily limited to:

- Collection, review and synthesis of relevant background material;
- Review of current and potential future tourism trends and their implications for the region;
- Evaluation of past/current market visitation; and
- Evaluation of market opportunities.

1.4.2 Phase 2 - Review of the Accommodation Product

Activities included in this phase included, but were not necessarily limited to:

- Compilation of an accommodation inventory;
- Survey of accommodation operators;
- Review and evaluation of accommodation sector performance – using available data combined with responses to survey; and
- Completion of an accommodation needs assessment.

1.4.3 Phase 3 - Identification and Prioritization of Tourism Product Opportunities

Activities included in this phase included, but were not necessarily limited to:

- Benchmarking research on analogous destinations to identify key success factors;
- Developing, testing (at a team and committee workshop) and refining a long term development strategy comprising six (6) strategic initiatives;
- Completing a product market match to assess product resources and opportunities against market needs;
- Identifying a long list, then prioritizing and defining a short list of product development opportunities; and

- Soliciting review and comment on the Interim Report from tourism industry stakeholders.

1.4.4 Phase 4 - Analysis of Potential Catalyst Project

The assignment terms of reference called for the analysis of the potential for a “star generator” attraction in the YAS region. The long-term development strategy (Phase 3, above) recommended that such an attraction should be considered a “catalyst” for tourism economy growth in the long term after short term and medium term initiatives to stabilize and re-build the tourism economy were completed.

Task completed in this phase included, but were not necessarily limited to:

- Consultation with tourism industry stakeholders on potential long term catalyst projects;
- Case study research on catalyst projects in comparable tourism economies; and
- Identification and pre-feasibility of recommended catalyst project.

2. Situation Assessment

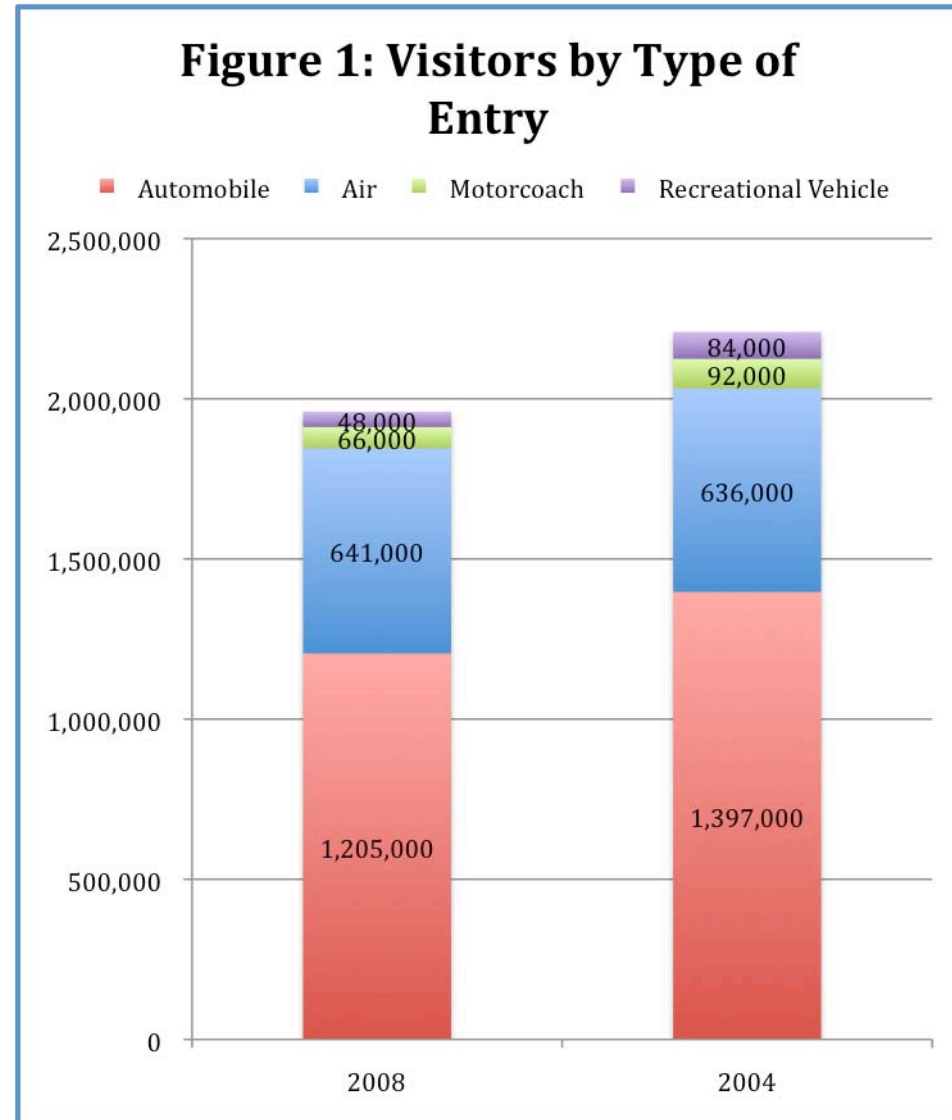
2.1 Provincial Context

In general, the Nova Scotia tourism economy has sagged over the past five years – mostly in the past 12 months – while experiencing some significant changes. Given the deterioration of economic conditions globally, which is not anticipated to improve substantially within the next 2-3 years, marked improvement in the Nova Scotia tourism economy cannot reasonably be expected before 2011.

2.1.1 Visits

Non-resident visits to Nova Scotia declined by approximately 248,000 or 11% between 2004 and 2008, from 2.208 million to 1.96 million. Between 2007 and 2008 the decline was 8% or approximately 175,000 entries².

As illustrated in Figure 1, entries by automobile (-14%), motorcoach (-28%) and recreational vehicle (-43%) declined while entries by air increased (1%). Entries by automobile are still the most common (61%) with air entries the second most



² Nova Scotia Tourism, Culture and Heritage

common method of entry, rising from 29% to 33% of the total³.

2.1.2 Visitor Origins

Between 2004 and 2007, the relative importance of Nova Scotia's visitor markets shifted.

As illustrated in Figure 2, overseas, Western Canada, Ontario and Quebec markets increased their share of total visits while all

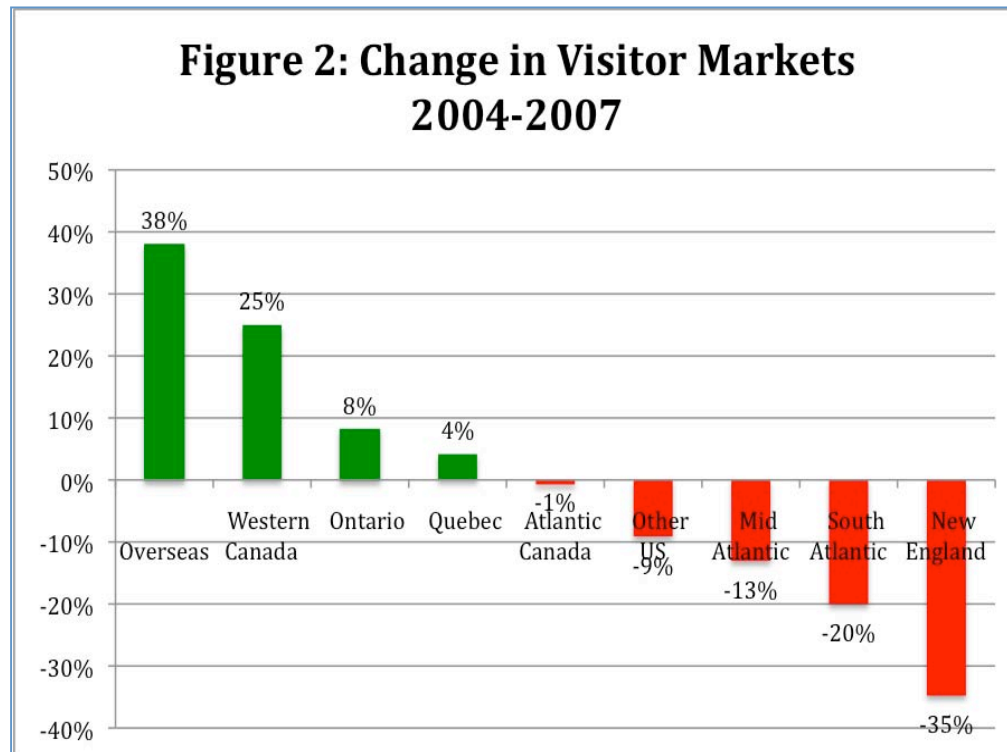
US markets and Atlantic Canada saw their shares decrease⁴. Obscured somewhat by the changes in relative shares of each market are the changes in numbers of visits.

Five markets combined for a drop of approximately 118,100 visits, while a collective increase of approximately 66,500 in the other four offset some of the loss, resulting in an overall decline of 3% between 2004 and 2007. The shrinking markets included:

- Atlantic Canada (-48,300);
- New England (-37,500);
- South Atlantic (-12,500);
- Mid-Atlantic (-8,100); and
- Other U.S. (-11,800) – total US market loss was approximately 91,200 or 14%⁵.

Growth markets included:

- Western Canada (+25,800);
- Overseas (+21,400);
- Ontario (+18,500); and
- Quebec (+800)⁶.



³ Source: Nova Scotia Tourism, Culture and Heritage

⁴ Source: Nova Scotia Tourism, Culture & Heritage

⁵ Nova Scotia Tourism, Culture & Heritage

⁶ Ibid

2.1.3 Accommodation

Between 2004 and 2008, roofed accommodation business held up better than non-resident visits, recording only a 3% drop in room nights sold (from 2.579 million to 2.503 million) and a 1% drop in occupancy (from 51% to 50%)⁷.

Some of the loss in room nights sold as a result of declining non-resident visits may have been offset with a possible increase in room nights occupied by Nova Scotia residents travelling within the province. Unfortunately, there is no data currently available to confirm this.

Campground business fared worse than roofed accommodation. Between 2004 and 2007, the total number of campsite nights sold fell by 56,000 or 7%⁸. Given that so-called “short term” campsite night sales declined by 75,000 or 26%⁹, it would appear that longer-term campsite night sales actually increased during the period. In general, it is likely that non-resident visitors who used campsites are more likely to be captured in short term sales, while residents of Nova Scotia are more likely to be longer-term campers.

⁷ Ibid

⁸ Ibid

⁹ Ibid

2.2 Yarmouth & Acadian Shores

While tourism in Nova Scotia has drifted downward since 2004, it has plummeted in YAS.

Given the importance of the ferry service in delivering non-resident visitors to YAS and the declining numbers who are using it, an immediate recovery in the region’s tourism economy is unlikely.

2.2.1 Visits

The total number of non-resident visitors to YAS in 2004, both overnight and same-day visitors, is estimated at 176,600. A breakout of overnight and same-day visitors is not available.

By 2008, the estimate drops to as much as 128,800 or as little as 109,600¹⁰, a decline of between 47,800 (-27%) and 67,000 (-38%) visits. It is impossible based on available data to determine if the lost visits are mostly overnight visitors, mostly same-day visitors, or equally split between the two. However, the drop in accommodation room nights

¹⁰ At this time, a single, comprehensive measure of the number of visitors to the YAS region is not available. Consequently, to derive estimates of YAS visitors the consultants used a combination of the 2004 provincial visitor exit survey and provincial statistics provided for the period 2004-2008 (see YAS Visitor Estimation Methodology in Appendix A).

sold of 27,100 during this period (see Section 2.2.3, below) would suggest that more overnight than same-day visitors have been lost.

It is important to note that the Visitor Exit Survey excludes residents of Nova Scotia travelling within the province. At this time we are not aware of any measure of resident visits to YAS in 2008, although Nova Scotia residents took approximately 5.7 million domestic person trips in 2006¹¹. It is

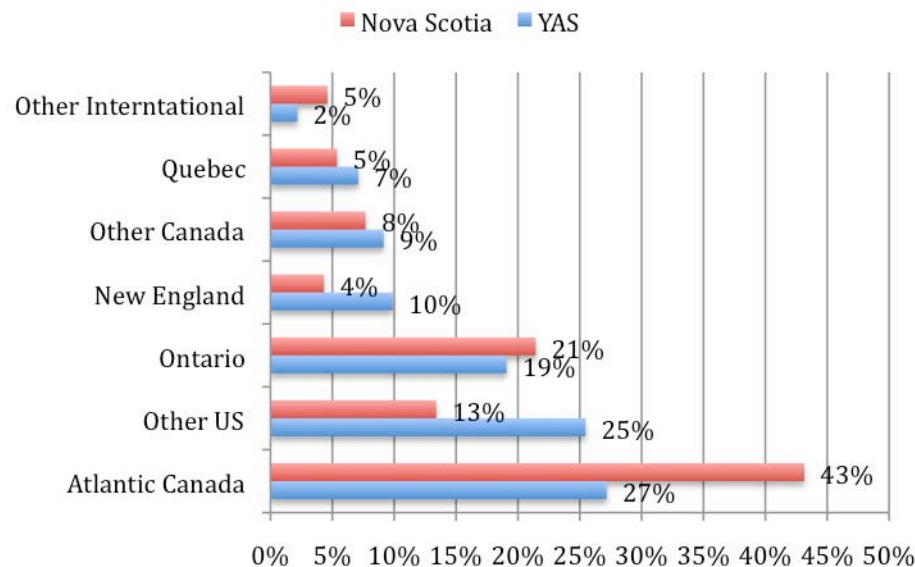
possible that resident visits may have increased and softened the impact of declining non-resident visits, or declining resident visits may have added to the downward trend.

2.2.2 Visit and Visitor Characteristics

The most complete, available information on the characteristics of visits and visitors to YAS is the special data analysis of the 2004 Exit Survey¹². Key characteristics of YAS visits and visitors based on the 2004 Exit Survey results include the following:

- Average party size of 2.2 persons, same as the provincial average;
- Average party nights spent in Nova Scotia was 11.4, substantially higher than the provincial average of 6.5;
- Proportionately more male visitors (49%) than the provincial average (42%);
- In general, older visitors (55% 55 years of age or older) than in the province overall (36% 55 years of age or older);
- In general, higher income households (91% \$40,000 and above) than in the

Figure 3: 2004 Visitors by Origin



¹¹ 2007 Report Card, Nova Scotia Tourism Partnership Council, 2007

¹² See footnote 2, above.

- province overall (82% \$40,000 and above);
- In general, YAS visitors were higher yield (\$1,515 average expenditure per party) than visitors in the province overall (\$947);
- Proportionately more first time Nova Scotia visitors (35%) than in the province overall (28%);
- As illustrated in Figure 3 (previous page), compared to the province proportionately more visitors from New England, other U.S. origins, Quebec and Canadian provinces west of Ontario;
- Compared to the province, proportionately more visits for general pleasure/recreation (68% vs. 47%) and business (11% vs. 7%), while less visits for convention/conference/meeting (1% vs. 4%) and visit friends/relatives (17% vs. 31%);
- Compared to the province, proportionately greater use of motels (30% vs. 17%), B&B (18% vs. 11%), private cottage or vacation home (7% vs. 3%), privately operated campground (8% vs. 6%) and national/provincial park campground (5% vs. 3%);

- As illustrated in Figure 4, compared to the province notable differences in top 5 reasons for Nova Scotia visit;
- As illustrated in Figure 5, compared to the province notable differences in visitor participation in top 6 nature or outdoor activities;
- As illustrated in Figure 6, compared to the province notable differences in top 6 places/events visited during trip; and
- As illustrated in Figure 7, compared to the province notable differences in top 5 things visitors liked about their visit to Nova Scotia.

Figure 4: 2004 Top Reasons For Visit

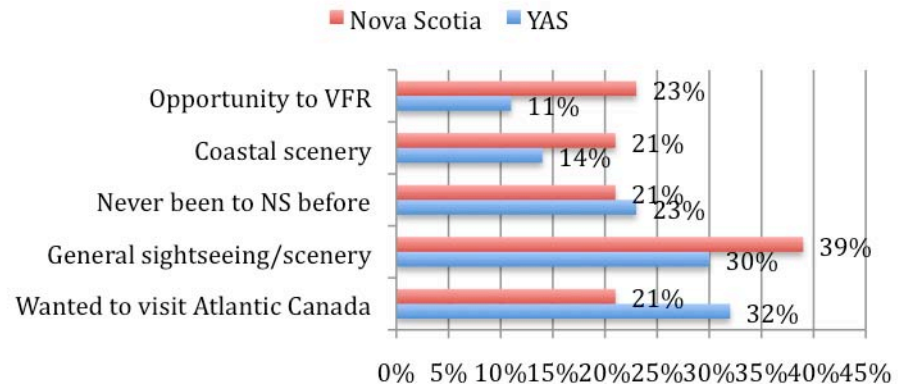


Figure 5: 2004 Top Nature or Outdoor Activities

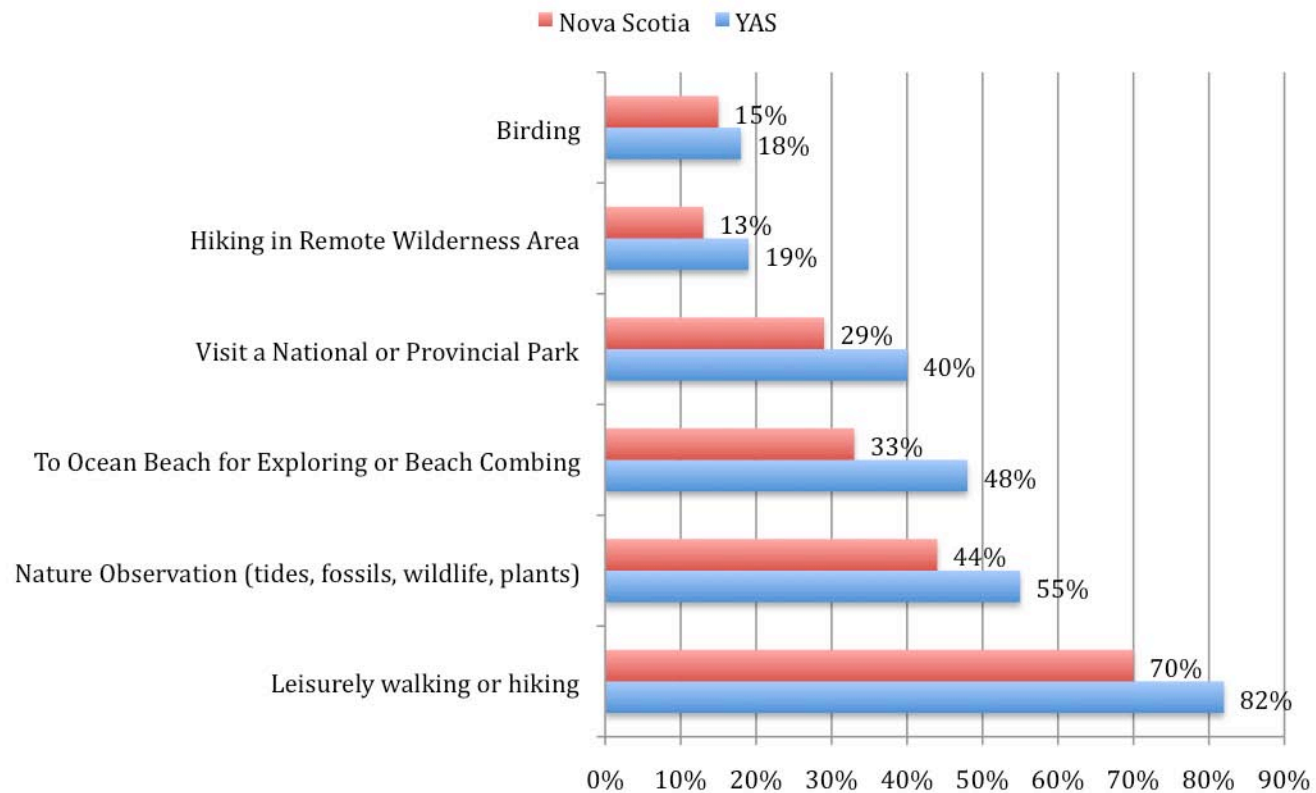


Figure 6: 2004 Top Places/Events Visited

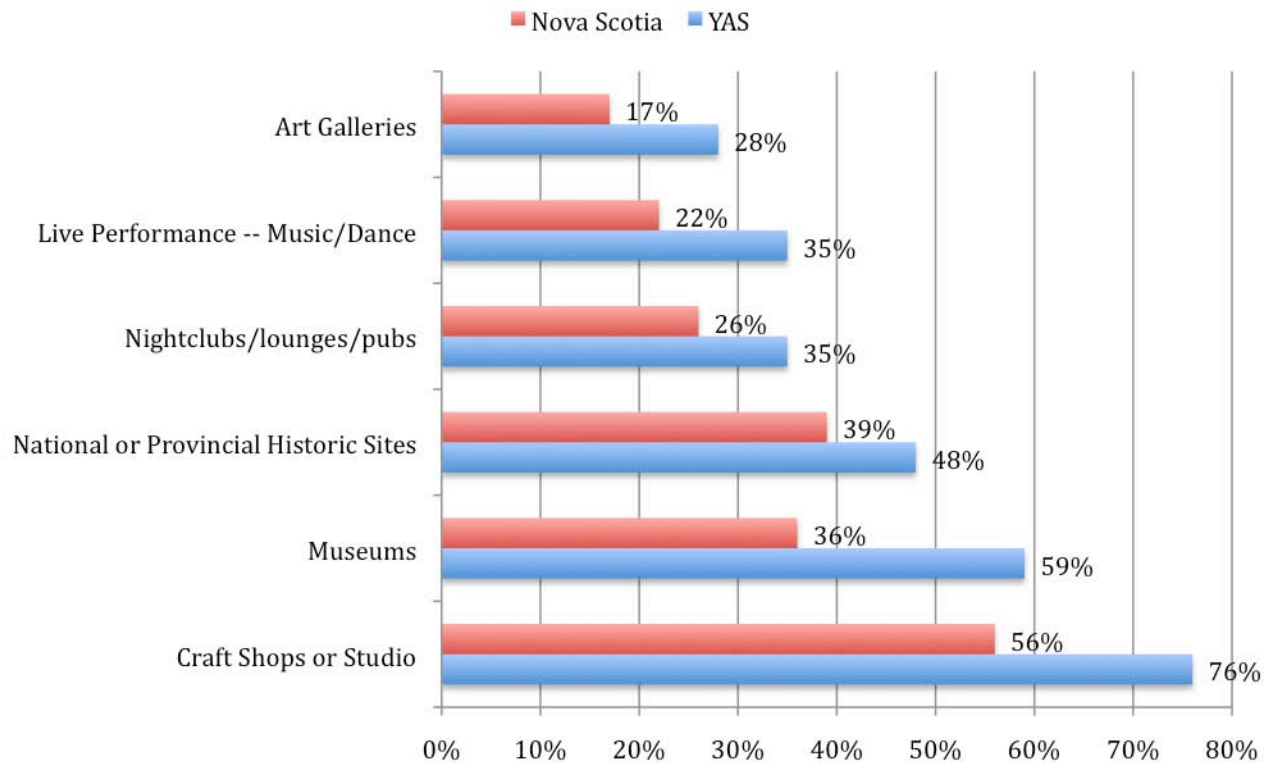
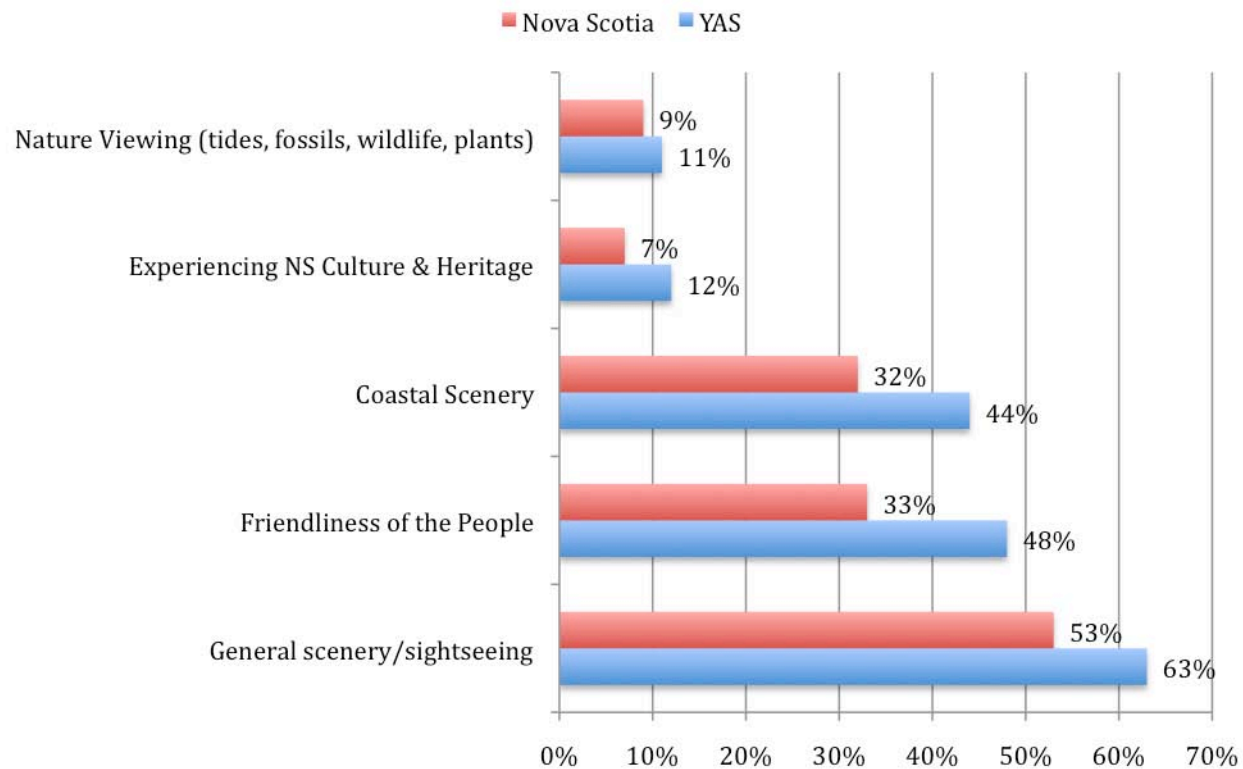


Figure 7: 2004 Top Things Like About Visit



2.2.3 Accommodation

The assessment of the YAS accommodation sector was compiled from information and reports provided by SWSDA, review of the Nova Scotia Doers' and Dreamers' 2008 Guide, on-line survey of accommodation operators (25 respondents) conducted by the consultants in June/July 2008 and fieldwork undertaken by the consultants in May, June and July 2008.

It is apparent that, in general, this segment of the YAS tourism economy is suffering greatly and may be the most fragile. At issue is the fact that a vibrant accommodation sector is required for the tourism economy to facilitate recovery and future growth and to reap maximum economic benefits.

The 2008 inventory comprised 49 commercial accommodation properties offering a total of 1,067 accommodation units – 630 rooms in roofed accommodation (59%) and 437 campsites (41%).

Figure 8: Accommodation Inventory

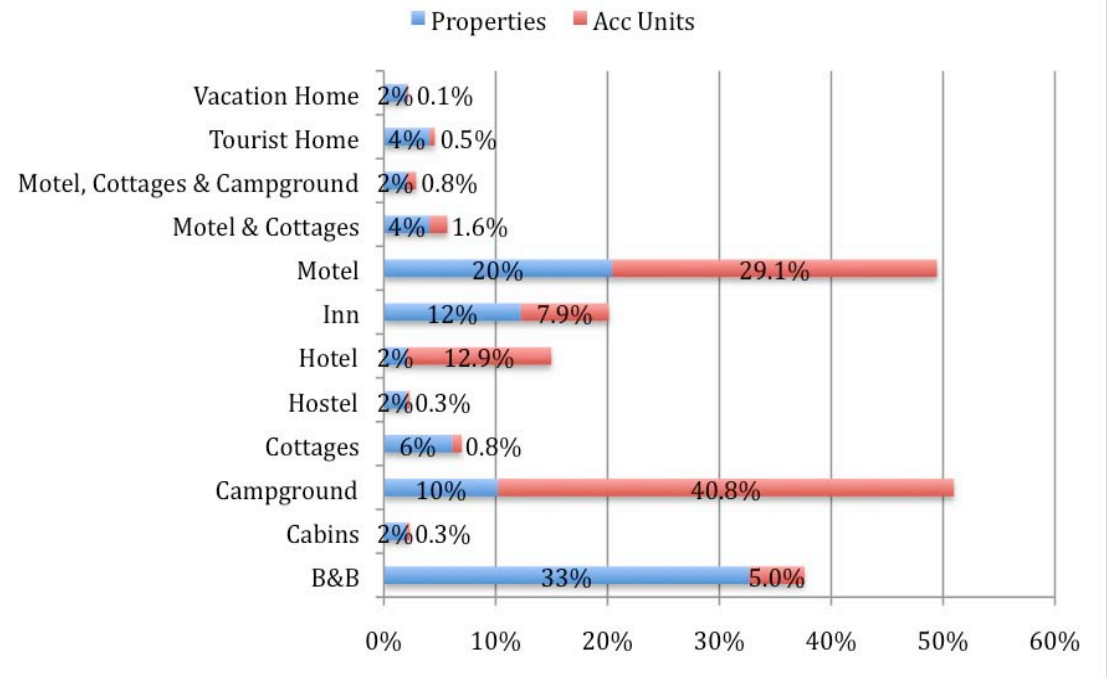


Figure 8 illustrates the distribution by type of property and number of accommodation units. As illustrated:

- B&B's comprised the largest proportion of properties (33%) but offered only 5% of the accommodation units;
- The largest proportion of accommodation units were provided by campgrounds (41%), while they comprised only 10% of the properties;
- The motel segment comprised the second largest proportion of properties (20%) and provided the second largest proportion of accommodation units (29%);
- Combined, hotels and inns comprised 14% of the properties while providing 21% of the accommodation units.

There were more seasonal accommodation units (600 or 56%) than year round (467 or 44%). All of the units provided by campgrounds were seasonal, while 26% (165) of roofed accommodation units were seasonal, 74% (465) available year round.

The largest concentration of accommodation units (664 or 62%) was located in the central part of YAS (Town and Municipality of Yarmouth). Approximately 60% of those units were year round roofed accommodation (402).

The northern part of YAS (Municipality of Clare) was home to almost one-third (363 or 34%) of the accommodation units.

Approximately 72% of those units were seasonal campsites (263).

The southern section (Municipality of Argyle) was the location for only 40 accommodation units (4%). Approximately 65% of those units were year round roofed accommodation (26).

During the fieldwork, the consultants conducted a subjective assessment of the market readiness of the YAS accommodation properties. The overall physical condition and appeal of the property relative to its price positioning, and the comprehensiveness of the marketing program were the two assessment criteria. Of the 43 properties for which assessments were completed (owners of 6 properties were not available at the time of site visits):

- 20 properties providing 442 accommodation units (41% of total inventory) were assessed as having a high degree of market readiness;
- 3 properties providing 150 accommodation units (14% of total inventory) were assessed as having a medium degree of market readiness, requiring some upgrading to their physical condition and appeal;

- 9 properties providing 301 accommodation units (28% of total inventory) were assessed as having a medium degree of market readiness, requiring enhanced marketing;
- 3 properties providing 31 accommodation units (3% of total inventory) were assessed as having a medium degree of market readiness, requiring some upgrading to their physical condition and appeal as well as enhanced marketing;
- 4 properties providing 73 accommodation units (7% of total inventory) were assessed as having a low degree of market readiness, requiring substantial upgrading to their physical condition and appeal; and
- 4 properties providing 50 accommodation units (5% of total inventory) were assessed as having a low degree of market readiness, requiring substantial upgrading to their physical condition and appeal as well as substantially enhanced marketing.

Information gathered from the on-line survey, supplemented with information provided by operators during site visits, revealed the following regarding expected future changes to accommodation inventory over the next 3-5 years:

- 2 operators are planning to close their properties, which would reduce roofed accommodation units available by 36 or approximately 6% -- 1 property scored low on physical facility condition and appeal in the market readiness assessment;
- 7 operators (94 units), including the 2 operators planning to close, are planning to sell their properties;
- 3 operators (128 units) are planning to renovate their properties – all scored high on physical facility condition and appeal in the market readiness assessment;
- 1 operator (2 units) is planning to renovate and expand their facilities as well as expand and/or offer new services – the property scored high on physical facility condition and appeal in the market readiness assessment; and
- 3 operators (25 units) are planning to renovate, expand and build new facilities as well as expand and/or offer new services – all scored high on physical facility condition and appeal in the market readiness assessment.

Based on roofed accommodation statistics for YAS properties collected by the Nova Scotia Department of Tourism, Culture and Heritage, approximately 63,000 room nights

were occupied in 2008 yielding an annual occupancy rate of 35%. This is a drop of 27,000 occupied room nights (-30%) since 2004 when the occupancy rate was 44%.

The 2008 occupancy rate is far below the provincial occupancy rate of 51% (although an increase from 33% occupancy in 2007), and lags occupancy rates of 37% (Fundy Shore & Annapolis Valley) and 42% (South Shore) in neighbouring travel regions.

It is not surprising, therefore, that some YAS operators are planning to close or sell their businesses. Furthermore, since 2007 at least one roofed accommodation property has closed. For the most part, roofed accommodation properties that are currently struggling benefited substantially from short stay (1 night) ferry generated visits prior to the reduction of ferry service (2005) and change in ferry schedule (2007).

And yet there are some strong performers exceeding the 35% average occupancy for YAS. These are typically smaller B&B, inn or cottage properties that in most cases have diversified their customer mix to include a substantial number of business travellers, many of these residents of Nova Scotia and/or are attracting niche markets – very narrow (and often small) market segments defined by a specific travel interest.

2.2.4 Attractions

The assessment of the YAS attractions sector was compiled from information and reports provided by SWSDA, review of the Nova Scotia Doers' and Dreamers' 2008 Guide, on-line survey of attraction operators (19 respondents) conducted in June/July 2008 and fieldwork undertaken by the consultants in May, June and July 2008.

This sector of the tourism economy is showing signs of growth and development, which is essential if YAS is to attract more visitors to the region and for longer stays. Attractions drive visits.

All of Nova Scotia's key attraction characteristics are represented in the region from seacoasts and lighthouses to fishing villages and pastoral landscapes and forests. There is a range of gated and non-gated attractions as well as events and festivals.

In 2008 there were 39 attractions listed for YAS in the Doers' and Dreamers' provincial guide.

The YAS section of the guide listed 21 built attractions of which 14 were museums and historic sites. The other 7 included:

- 2 churches;
- The Université Sainte-Anne and the Acadian Centre Archives located on the campus;

- The Art Gallery of Nova Scotia Western Branch;
- a performing arts venue (Th'YARC); and,
- a municipal park (Belliveau Cove Municipal Park).

On the title page of the YAS section in the guide there were 6 “don’t miss Festivals” listed.

In the Outdoors section of the guide, attractions listed for YAS included:

- 4 beaches (3 in provincial parks);
- 3 golf courses;
- 5 provincial parks (including 3 listed under beaches);
- 1 walking and hiking trail (Wedgeport Point Nature Trails);
- 1 riding stable; and
- 1 marina.

Not listed in the guide are a number of attractions dispersed throughout the region. These include, but are not necessarily limited to:

- Many, mostly community-based, festivals and events;
- Art de la Baie – a tour of 14 artists’ studios and shops located in Clare;

- Workshops and galleries of artisans not included in Art de la Baie;
- Sport facilities for hockey, curling, baseball/softball, soccer, etc.;
- Tobeatic Wilderness Reserve;
- Sea Captains’ Homes and Mercantile Heritage Walk; and
- Dinner theatre in Yarmouth.

A little more than one-quarter of all listed attractions were open year round. Most operate May through October.

Geographically, the listed and unlisted attractions are dispersed throughout YAS, with the heaviest concentration of built attractions in and around the town of Yarmouth, while the majority of festivals take place in Clare and Argyle (see Appendix B for a list of 2009 Festivals and Events).

This sector can be characterized as diversified but offering primarily “While in the Area” type attractions with generally low visitation. There are two “Must See” attractions (Cape Forchu Lighthouse; Le Village historique acadien de la Nouvelle-Écosse) but no compelling travel generator or “Worth the Drive” type attractions.

Attendance at built attractions is for the most part less than 10,000 visitors annually with the exception of Th’Yarc (15,000-

20,000, mostly local¹³) and Le Village acadien de la Nouvelle-Écosse (12,500 in 2007¹⁴). Attendance at the largest festival (Le Festival acadien de Clare) was estimated at 40,000 in 2007¹⁵ although approximately 70% of visitors are local.

Some growth and change is underway, including:

- The imminent opening of the new Rendez-vous de la Baie Acadian cultural centre (potential to be a “Must See” attraction);
- Planning underway for relocating and expanding Th’YARC, a performing arts venue;
- Acadian Shores Interpretive Tour – launched in the fall of 2008, links 25 existing Acadian tourism attractions in Clare and Argyle with interpretive and wayfinding signs and a bilingual map brochure;
- Festival international acadien de Par-en-Bas – launched in 2008, linked and coordinated 4 community-based Acadian festivals in Argyle;

¹³ Source: Th’Yarc, 2008

¹⁴ Source: Le Village acadien de la Nouvelle-Écosse, 2008

¹⁵ Source: Le Festival acadien de Clare, 2008

- As of 2008, efforts to coordinate the scheduling of Acadian festivals and events has resulted in 5-week schedule of continuous Acadian festivities; and
- Hiring of a Group Sales Manager by the Room Levy Group to attract new conventions, conferences and events.

Furthermore, responses to the on-line survey revealed that over the next 3-5 years:

- 6 attractions (including Cape Forchu lighthouse, the Yarmouth County Museum and Archives and Th’YARC) are planning to renovate their facilities;
- 5 attractions (again including Cape Forchu lighthouse, the Yarmouth County Museum and Archives and Th’YARC) are planning to expand their facilities;
- 3 attractions (including Th’YARC) are planning to build new facilities;
- 9 attractions are planning to expand and or offer new programs and services; and
- Only 2 attractions are planning to reduce their hours of operation.

A number of themes or stories are presented by existing attractions and festivals and events, including:

- Acadian history and culture;
- Catholic religion;

- Nova Scotia Art and Craft;
- Yarmouth seafaring history;
- Sport fishing;
- Commercial fishing industry; and
- Early settlement and pioneers.

2.2.5 Food & Beverage

The assessment of the YAS food & beverage sector was compiled from information and reports provided by SWSDA, review of the Nova Scotia Doers' and Dreamers' 2008 Guide and fieldwork undertaken by the consultants in May, June and July 2008.

Typically this is the most volatile sector of a tourism economy, and often in flux. Generally it responds quickly to recovery and growth in visits and length of stay, but rarely is a driver. In YAS there have been some recent restaurant closures and some operations were struggling in 2008.

There were 11 restaurants listed in the provincial guide but an estimated 3-4 times as many restaurants located within the YAS region.

The majority of restaurants are clustered in and around Yarmouth. Outside of Yarmouth, there more dining opportunities in the Clare region than in Argyle.

Coffee shops, fast food and family style table service restaurants are plentiful, with only a few pubs and highly regarded culinary experiences.

A substantial number of restaurants are seasonal operations or at least operate on reduced hours outside of summer season. Many restaurants operate with limited hours during the summer season as well.

The "Savour the Local Sea" program, with good support from restaurants and seafood suppliers, will highlight local seafood. It launches in February 2009.

2.2.6 Tourist Retail

The assessment of the YAS tourist retail sector was compiled from information and reports provided by SWSDA and fieldwork undertaken by the consultants in May, June and July 2008.

The breadth and robustness of the tourist retail sector is often an indicator of the overall health of a region's tourism economy, but it is not a driver. Currently this sector is languishing in YAS – neither expanding nor contracting substantially.

There are shopping opportunities throughout the region with the heaviest concentration in and around Yarmouth including a substantial number of "big box", national brand retailers that have

established Yarmouth as regional retail centre.

The central business district of Yarmouth, however, is in decline with a large number of store closures in 2007 and currently many empty retail spaces.

Tourist retail, characterized as medium to small specialty stores and shops featuring destination branded merchandise, regional specialty items and gifts is much less developed. There are a few shops in Yarmouth while branded and regional specialty items are also available in small quantities at some attractions, visitor information centres and convenience stores in Clare and Argyle.

Local retail “icon” Frenchies, a second-hand clothing store with two locations in Clare (where it originated) plus several more in the region, has regional and beyond appeal, attracting visits by mostly resident Nova Scotia travellers.

There are a substantial number of art and artisan galleries, craft outlets and craft “events” (such as the quilt sales), with many of these located in rural areas. Retail sales data is not currently available, but anecdotally and based on the consultants’ fieldwork observations, art and craft seems to be the strongest element of tourist retail in YAS.

2.2.7 Tour Operators

The assessment of the YAS tour operator sector was compiled from information and reports provided by SWSDA, review of the Nova Scotia Doers’ and Dreamers’ 2008 Guide and interviews with tour operators undertaken by the consultants in May, June and July 2008.

This sector is very entrepreneurial, growing and performing well when visitor numbers are growing and visitation is diversified. Currently the sector is small and not growing in YAS.

In 2008 the provincial guide listed 1 tour operator for YAS – “A Day by the Sea Tours” that sells primarily to CAT Ferry passengers through marketing and sales partnership with Bay Ferries. In 2008 there were 2 additional operators (C&J’s, Rodd Tours) not listed in the provincial guide.

There are few, if any, actively promoted boat tours and only 1 official sea kayaking tour outfitter/operator in YAS. Anecdotally, there would seem to be many informal water-based tour opportunities within the region that can be arranged by accommodation operators.

A minimal number of motor coach tour operators infrequently include Yarmouth on Nova Scotia itineraries.

2.2.8 Transportation

The assessment of the YAS transportation sector was compiled from information and reports provided by SWSDA and an interview with Bay Ferries management undertaken by the consultants in June 2008.

Transportation links with New England have traditionally been the core element supporting the tourism economy of YAS given its relatively “remote” location in Nova Scotia. Since 2005 this core has eroded and tourism has wilted. Nonetheless, it is still key ingredient to the long-term growth and sustainability of tourism in YAS.

The primary modes of transportation to/from Yarmouth are personal automobiles and the CAT Ferry (June to mid-October). There is limited scheduled bus service between Yarmouth and Halifax but no passenger (or freight) rail service (infrastructure has been removed).

Starlink Aviation of Montreal recently announced that it intends to offer scheduled air service from the Yarmouth International Airport to Halifax and Portland, Maine. Twice-daily flights, five days a week on an 18-seat Jetstream 31 aircraft is planned to commence in early February 2009.¹⁶

¹⁶ www.thechronicleherald.ca, January 10, 2009.

Improvements to the 100 series highways between Yarmouth and Halifax are ongoing. No known bus service improvements are scheduled.

It appears that the CAT Ferry service is struggling with a combination of declining traffic and rising operating, especially fuel costs. Yarmouth arrivals are down 49% from 2004 to 38,200 in 2007 while Digby arrivals (Prince of Acadia) have been relatively stable at 30,000 over the past few years. In August 2008, the government of Nova Scotia announced a \$4.4 million subsidy to Bay Ferries to offset higher fuel prices for the CAT. In January 2009, the government announced that it will fund financial losses for the 2009 season up to a maximum of \$12 million¹⁷.

From a transportation perspective the YAS region is currently underserved but with sufficient infrastructure to significantly expand the transportation options.

2.2.9 Marketing

The assessment of YAS tourism marketing activity was compiled from information and reports provided by SWSDA. The four elements of tourism destination marketing were examined: research and planning;

¹⁷ www.gov.ns.ca/news, January 22, 2009.

product development; advertising and promotion; and sales.

Since SWSDA has become fully engaged in the YAS tourism economy, significant resources have been invested and numerous advances have been made to enhance the region's destination marketing. A solid platform has been established to support future recovery and growth.

Research & Planning

Substantial planning activity has occurred and continues to occur within the region with SWSDA providing leadership in this area. However, market research, both visitor tracking (visitor numbers, spending, visitor characteristics, visitor intentions, visit characteristics) and advertising tracking (response rates, fulfillment rates, return on investment) is weak.

Some visitor and visit tracking data collected by the province is available for YAS, but with the exception of accommodation occupancy, is dated.

High-level statistics on ferry traffic is shared by Bay Ferries, but often not in a timely way. Statistics on 2008 traffic requested by the consultants was not provided.

Product Development

With direction from industry stakeholders, SWSDA tourism staff has initiated and are

working on a large number of product development initiatives, including but not necessarily limited to:

- Total Market Readiness (mentoring, mystery shops, workshops, GMIST, FAM, interpretive specialist) – first program intake completed in 2008, second intake scheduled for 2010;
- Acadian Product Development (2008) -- Acadian festival resources (tents/stage, artistic director) and collaboration (scheduling, marketing); Acadian Shores Interpretive Tour (site, wayfinding & interpretive signage, map/brochure – a second phase of this project is in development); and,
- Golf enhancement (2008) – commenced “Affordable Four” joint marketing and product enhancement initiative with 4 YAS golf courses.

Advertising & Promotion

With industry stakeholder direction, guidance and financial support (particularly the Room Levy Group), in 2008 SWSDA tourism staff initiated a number of advertising and promotion activities, including but not necessarily limited to:

- Development of new bilingual website (www.yarmouthandacadianshores.com) and expanded web presence;

- Branded trade show booth;
- Development, publication and distribution of a new bilingual YAS lure brochure;
- Travel writer program;
- Print media campaign – newspapers and magazines;
- Print media advertisements in Bay Ferries' publications;
- Presence in provincial Doers' and Dreamers' Guide and Southwest Nova visitor guide (2008); and
- Public relations campaign in the Halifax Regional Municipality.

Sales

A strong partnership has been developed with Bay Ferries to sell YAS product.

Currently there are two “official” (Yarmouth, Belliveau Cove), and I “unofficial” (Petro Canada Service Station in Pubnico) visitor information centres, including a local YAS information counter and counselling service in the Yarmouth Provincial Visitor Information Centre. A key and important feature of the Yarmouth VIC is bilingual service.

A Provincially operated trip counselling service was provided on the CAT during the

2008 season, however there is room for improvement with respect to knowledge of what to do and see in YAS.

Plans for 2009 include:

- Provision of VIC services at the Yarmouth International Airport once scheduled flights begin, and at Rendez-vous de la Baie Acadian cultural centre when it opens; and
- Application to the province for financial support to establish visitor kiosks in strategic locations including Pubnico, Yarmouth, Arcadia/Tusket and Salmon River.

With the development in 2009 of a new visitor guide (in partnership with Transcontinental publications), the provincial Doers & Dreamers Guide will no longer be the primary in-market visitor guide for the region -- and the main comprehensive regional map remains the provincial travel regions map. A detailed YAS map is in development.

Individual YAS tourism business brochures are available at many tourism business locations, but not all.

2.3 Issues & Opportunities

The key issues that need to be addressed in the Destination Development Plan include, but are not necessarily limited to:

- Insufficient critical mass of compelling experiences and attractions to attract and keep visitors in the region;
- Lack of comprehensive, relevant and timely market intelligence to measure YAS tourism economy performance and provide a sound information base for future marketing decisions;
- An eroding accommodation base, some of which requires physical plant and marketing enhancement; and
- Insecure future for transportation connections from New England including the ferry service and the recently announced scheduled air service.

The YAS region has some competitive strengths and assets that present opportunities for growing tourism in the region, including but not necessarily limited to:

- Compelling “stories” -- such as shipbuilding, sea captains, historic English and French settlement and co-existence, 19th century summer playground for the well-to-do, international tuna sport fishing

tournaments, Nova Scotia’s first tourism destination for U.S. residents -- that offer potential for interpretation;

- The underutilized natural resources and spectacular diversity of landscapes -- seacoast with beaches and bluffs, island archipelago, large rivers flowing out of the wilderness areas inland, and the numerous inland lakes;
- The living Acadian culture and historical roots throughout the region;
- Attraction and experience development potential that is in line with current tourism trends and that is authentic and unique;
- Positioning of Yarmouth as a regional centre for south west Nova Scotia in retail, events (sports, entertainment, culture), transportation and commercial fishery;
- One of the most temperate climates in Atlantic Canada;
- A World Biosphere Reserve designation (Southwest Nova) which encompasses a large part of the region;
- Newly developed (and still developing) coordination and collaboration in marketing among tourism stakeholders within the tourism sector;



- An industry sector that is fully behind the required change to achieve tourism growth and political leadership that is supportive; and
- Strong leadership and staff support for destination development and marketing through the Tourism Division of SWSDA.



3. The Tourism Destination Development Strategy

The Yarmouth & Acadian Shores (YAS) region has been part of the tourism landscape in Nova Scotia since the 1870's when the first ferry connections into Maine were established and wealthy New Englanders came across for summer holidays. Well-to-do Nova Scotia residents built summer homes and also spent vacation time in the region.

Today the industry is in crisis.

Tourism has survived and at times thrived through the strength, adaptability, versatility and collaborative efforts of the industry stakeholders. These qualities need to be called upon once again to pull the sector out of the current crisis mode.

This will not be easy. Important realities facing the YAS tourism economy have created a challenging environment.

Tourism demand from key markets is soft and likely to remain so for 2-3 years. For many visitors to Nova Scotia there are attractive intervening destinations between their entry point and YAS. And, YAS needs to undergo a fundamental shift from a transportation node to a destination for non-resident leisure travellers.

3.1 Goals

A number of goals and objectives for the YAS tourism economy, many of them intended to be achieved in the short-term, were articulated in the October 2007 Destination Development Plan prepared by the South West Shore Development Authority (SWSDA). Two of the long-term goals introduced in that plan are the primary goals of this long-term destination development plan.

- Expansion and improvement of the overall existing regional tourism product and infrastructure.
- Recovery and then long-term growth in the YAS tourism economy.

3.2 Vision & Positioning

The vision for tourism in Yarmouth & Acadian Shores (YAS) comprises three key elements:

- A Nova Scotia tourism destination that visitors **choose** to visit for leisure and business;
- A rich tapestry of tourism experiences with broad market appeal grounded in the region's **natural and cultural heritage**; and

- A diversified tourism economy that capitalizes, but is not dependent, on its **unique transportation links** to the New England States and Halifax.

SWSDA has begun to position the region as offering *‘an experience shaped by the sea’* based on branding research completed by Bristol Communications.

3.3 Markets

The recommended geographic markets for YAS to pursue include both non-resident visitors to Nova Scotia and residents of Nova Scotia.

3.3.1 Non-Resident Visitors

As a result of the highway network in Nova Scotia, all of the visitors travelling to the province by automobile, motorcoach or recreational vehicle represent potential visitors for YAS. Given the region’s distance from the province’s tourism hub in Halifax, in general longer stay visitors hold the most potential.

With Yarmouth’s unique international transportation links – seasonal ferry service to New England and recently announced year round scheduled air service from New England – the residents of and visitors to the New England States represent high potential markets for YAS. The state of Maine caters

to 10 million overnight visitors annually (mostly touring) with a total of 1.2 million travelling to the Downeast and Acadia region (Bar Harbour). Boston is the largest source market for visitors in Maine and the city of Portland has a total of 230,000 residents.

The recently announced scheduled air service will also connect YAS with Halifax, reducing travel time to the region for international air travellers arriving in Halifax. This increases the potential for YAS to attract these long-haul travellers.

In addition, ferry service from Saint John New Brunswick to Digby provides a more direct and shorter option than the highway only routes for New Brunswick residents and visitors travelling to western Nova Scotia, increasing their potential as YAS visitors.

3.3.2 Resident Visitors

Residents in the province take a total of 5.7 million domestic person trips per year.

Yarmouth’s role as regional service centre for western Nova Scotia presents opportunities for attracting residents living west of Halifax for meetings, personal and leisure travel.

The recently announced scheduled air service from Halifax presents opportunities

for attracting more travellers from Halifax but there is a need to overcome the lack of awareness and interest with Haligonians in particular. The population in Halifax is 370,000.

3.4 Strategic Initiatives

Six (6) strategic initiatives are recommended for implementation over the next 3-5 years and beyond. They are intended to complement each other, providing an integrated and cohesive plan that unfolds sequentially.

3.4.1 Product Development

Attractions and experiences draw visitors to destinations. And the more diversified the attractions and experiences in a destination, the more sustainable the destination over the long term. Reliance on too narrow a base of attractions and experiences leaves a destination vulnerable to shifts in market interests.

It is for this reason that in the over the long-term, market driven product development in 57 high potential experience markets (Figure 9) is recommended.

Over the short term, it is recommended that this product development begin with 9 readily accessible experience markets including:

- Amateur sport;
- Art and craft;
- Automobile (and motorcycle touring);
- Coastal hiking;
- Cuisine;
- Historic sites and buildings;
- Meetings and retreats;
- Music and dance; and
- Ship and boatbuilding heritage.

Market driven attractions and experiences are developed in response to the interests and needs of desired visitors.

Figure 9: YAS Experience Markets

Amateur live theatre	Culinary	Literature	Small Motorcoach Touring
Amateur sport competition	Deep sea fishing	Long term business	Specialty shopping
Amateur sport training	Downtown shopping	Motorcycle Touring	Spiritual retreat
Archaeology	Environmental learning	Music & dance	Study
Art & craft	Family time	Ocean canoe/kayaking	Sunbathing
Auto Touring	Fishing industry	Personal rejuvenation retreat	Swimming
Back country hiking	French language immersion	Pocket cruises	Urban walking
Back country tent camping	Freshwater canoe/kayaking	Power Boat touring	Visit Spa
Beachcombing	Freshwater fly fishing	Professional sport training	Visiting historic sites or buildings
Bicycle Touring	Freshwater sailing/boating	Religious	Visiting museums
Big box shopping	Freshwater spincast fishing	RV Camping	Water skiing/personal watercraft
Birding	Front country tent camping	RV Touring	Windsurfing/kite surfing
Boatbuilding industry	Genealogy	Sail Boat touring	
Coastal hiking	Horseback riding	Sea life viewing	
Conference/workshop	Large Motorcoach Touring	Short term business	

Source: the Tourism Company, 2008

3.4.2 Industry Stabilization

Given the current crisis nature of the YAS tourism economy, it is important that immediate action be taken to prevent further erosion of tourism infrastructure, particularly accommodation.

Development and implementation of a short-term tourism industry stabilization program designed to encourage continued operation and upgrading/enhancement of vulnerable but critical tourism infrastructure, particularly commercial accommodation, is recommended.

3.4.3 Industry Development Support

Many solid destination development plans that are endorsed and supported by tourism industry stakeholders flounder for lack of implementation resources. YAS has a head start with the funding and staff resources committed by SWSDA to date. It is recommended therefore, that municipal partners commit to the long-term funding of SWSDA's tourism industry support staff and activities.

3.4.4 Market Intelligence

The research undertaken for this plan has underscored the need for better market intelligence to guide product industry

development and marketing activities.

Comprehensive, relevant and timely tourism market demand information allows for good decisions.

It is recommended therefore that ongoing program for the collection, analysis and distribution to industry stakeholders of beneficial marketing intelligence, particularly visitor tracking research and advertising and promotion tracking, be developed and maintained.

3.4.5 Transportation Strategy

High capacity transportation links from New England are critical to the recovery and long-term growth of the YAS tourism economy. It is recommended, therefore, that a transportation strategy whose goal is to secure long-term ferry service and air links to New England be developed and implemented.

3.4.6 Next Level Catalyst

A big idea or "worth the drive" attraction or experience is required for YAS to realize substantial and sustained growth as a Nova Scotia tourism destination over the long-term, once a tapestry of diversified experience markets has been developed as a foundation for the industry. In addition, secured transportation links from New England with substantial capacity are

required to provide access to growth markets.

Therefore it is recommended that once long-term high capacity transportation links from New England have been secured, a Yarmouth waterfront redevelopment project with a new ferry terminal as the centrepiece and featuring recreation, entertainment, accommodation and retail elements be developed and implemented.

3.5 Marketing

SWSDA is providing leadership and coordinating destination marketing for YAS, undertaking activities in all four functional marketing areas: planning and research, product development, marketing communications and sales promotion.

Product development and research are the focus of the strategic initiatives in this plan. It is important, however, to the successful development of YAS as a destination that marketing communications and sales promotion activities occur at or above the current level.

Therefore we recommend that SWSDA continue to develop and implement a broad range of marketing communication and sales promotion activities, including but not necessarily limited to:

- YAS brand management

- Partnerships with tourism industry stakeholders to leverage marketing funds and resources;
- DigiMarketing or enhanced web-based approach to marketing communications – search engine optimization, social networking, blog, e-newsletter -- supported and enhanced with selective, targeted print and broadcast media; and
- In-market trip planning and management information, tools and services – visitor guides, visitor information centres, highway and wayfinding signs.

3.6 Organization

Many of the activities associated with the product development strategic initiative (Section 4) rely on working groups of tourism industry stakeholders to be formed and become active. To date, SWSDA staff has demonstrated the capacity to implement this type of grass roots approach to destination development.

It is recommended, therefore, that SWSDA tourism staff continue to engage industry partners using project specific working groups.

4. Strategic Initiative – Product Development

4.1 Introduction

A destination's authentic and unique natural and cultural heritage – history, music, art, wildlife and natural beauty – are the foundation for a sustainable tourism economy. Too many destinations miss this point and try to pursue the 'quick fix' attraction developments and big name support services/facilities (i.e. big box stores) and they try to attract prominent brand chain hotels and resorts themselves as travel generators. These destinations typically end up being very much the same – undifferentiated from other destinations with similar attractions, support services and brand hotels and resorts.

The highest potential product development opportunities for YAS lie in doing more to animate the region's stories and package experiences together to create a lively, integrated and diverse destination. Focus on the authentic aspects of the local cultural and natural heritage and to do it in such a way that these authentic resources are preserved and protected while providing memorable experiences for visitors and economic benefits for the region is a sustainable tourism approach.

4.2 Identifying Highest Priority Product Development Opportunities

The consulting team used a three-stage assessment process to identify the recommended 9 highest priority experience markets for investment in product development.

In the first stage, the consultants generated a list of more than 100 experience markets that either existed or had potential for development in YAS based on the current inventory of natural and cultural resources.

In the second stage, the 100+ experience markets were evaluated against three criteria selected by the consultants:

- Identifiable traveller/visitor experience or activity interest(s) that motivates travel;
- Existing product and/or resource potential to offer a superior visitor experience within YAS, beginning in the short term; and
- Broad geographic market appeal.

Using a combination of objective and subjective data and information, 58 experience markets were judged by the consulting team to comply with all three

criteria and became part of a so-called 'long list' of product development opportunities (see Figure 9 in Section 3, above) .

This long list comprises experience markets with perceived growth potential for YAS that can be expected to grow in response to product development activities.

In the third stage, each of the experience markets on the long list were ranked on eight key attributes including:

- **Market size** – the larger the number of potential visitors an experience could generate, the higher the rank;
- **Yield** – the larger the typical visitor spend associated with an experience while traveling, the higher the rank;
- **Travel driver** – the more likely that an experience is or could be a travel driver, the higher the rank;
- **YAS positioning consistency** – the more closely an experience aligns with YAS positioning, the higher the rank;
- **Provincial strategy consistency** – the more closely an experience market aligns with the provincial tourism strategy, the higher the rank;
- **Competitive context** – the lower the competition for an experience market

from other destinations, the higher the rank;

- **Season expansion** – the greater the potential for an experience to expand its season in YAS, the higher the rank; and
- **Tourism industry trends** – the more closely an experience market aligns with tourism industry growth trends, the higher the rank.

Nine experiences with the highest relative rankings were presented, discussed, validated and refined during the YAS Tourism Industry Workshop held in August 2008.

Each of these “highest priority” experience markets is described in more detail, below.

4.3 Amateur Sport Competition

4.3.1 Context

The Canadian Sports Tourism Alliance defines sports tourism as “any activity in which people are attracted to a particular location as a sport event participant, an event spectator, or to attend sport attractions or business meetings.” In previous work, the consultants have defined sports tourism as:

Visitors who have travelled more than 40 kilometres one way from home and/or stay

*overnight, and whose primary reason for travel is to participate in an organized sports-related activity.*¹⁸

Participants include three major categories:

- **Active participants**—individuals who engage in sport for the purposes of competition with others, under a set of rules, or to improve their personal sporting performance;
- **Attendees**—individuals who attend sporting games or events to observe; and
- **Volunteers**—individuals who volunteer their time and expertise in sport (for example, as a coach, a driver, an official or a fundraiser).

Active participants and attendees may be sport tourists, while volunteers typically are not.

The benefits of sports tourism are broadly based, but can be generally categorized into three categories:

Health and Well Being benefits include physical fitness and health; fun, recreation and relaxation; sense of achievement; family or household activity, and skills development;

¹⁸ City of Waterloo Sports Tourism Strategy, Cameron Hawkins & Associates, the Tourism Company, and F.J. Galloway Associates Inc., 2007

Social benefits include family and community cohesion; interpersonal connections; community safety; promotion of culture, heritage and diversity, and youth development; and

Economic benefits include direct and indirect expenditures by participants, volunteers and attendees; enhanced municipal profile, and the creation of event legacies.

All three types of benefits are important, however for the tourism economy economic benefits are the primary focus.

4.3.2 The YAS Opportunity

Sport is a major economic activity in Canada.

In 2004, \$15.8 billion of household spending was on sports, representing 1.2% of Canada's gross domestic product. While the proportion of adults who actively participated in sports dropped from 45% in 1992 to 31% per cent in 2004, sports spending rose significantly during the same period, from 0.9 % of GDP to 1.2%.¹⁹

Canadians participate in many sports, but the majority of time, effort and resources are concentrated on a handful of the most popular.

¹⁹ Ibid

Not surprisingly, ice hockey is in a class by itself as the most popular sport, leading all other sports in Active Participants, Attendees and Volunteers.

Four other sports attract significant participation in all three categories – soccer, baseball, basketball and volleyball.

The top ten sports, in terms of Active Adult Participants in Canada are:

1. Ice Hockey
2. Golf
3. Baseball
4. Skiing
5. Soccer

6. Volleyball
7. Basketball
8. Tennis
9. Curling
10. Bowling

In 2004/05, a total of 7% of all American travellers (12.3 million travellers) attended sports tournaments or competitions as spectators. This compares to a total of 11% of Canadian travellers (2.2 million).²⁰ Figure 10 illustrates the relative popularity of the top travel generator team sports for Canadian and U.S. travellers.

The market for amateur sport competition events may be segregated by:

- The nature of the event activity – single or multi sport;
- The geographic focus of the event – local, regional, provincial, national or international;
- Invitational events – events that are open to a (usually) limited number of participants that meet specific event criteria (performance standards, league standing, win-loss record);

Figure 10: Top Travel Generator Team Sports 2004/05			
Team Sport	Canadian travelers & % of total travelers	Team Sport	US travelers & % of total travelers
Ice Hockey	1,067,214 (5%)	Bowling	8,600,000 (4.9%)
Bowling	780,299 (4%)	Baseball	6,262,000 (3.6%)
Beach Volleyball	752,617 (4%)	Basketball	4,909,000 (2.8%)
Baseball	622,801 (3%)	Tennis	4,491,000 (2.5%)
Tennis	536,128 (3%)	Beach Volleyball	4,296,000 (2.4%)
Soccer	521,388 (2%)	Football	4,237,000 (2.4%)
Volleyball	517,121 (2%)	Volleyball	4,120,000 (2.3%)
Basketball	332,169 (2%)	Soccer	2,807,000 (1.6%)
Curling	310,469 (1%)	Badminton	1,541,000 (0.9%)
Football	234,452 (1%)	Paintball	1,471,000 (0.8%)

Source: Travel Activities and Motivation Study 2004-05, Statistics Canada

²⁰ Travel Activities and Motivation Study 2004-05, Statistics Canada

- Created events – an increasingly common form of event, often created specifically to generate tourist activity during shoulder of off-peak seasons, or to enhance the impact and appeal of an anchor event; and,
- Competitive versus non-competitive events (e.g. coaching clinics)

Sport Canada, a branch of the federal Department of Canadian Heritage and the federal agency responsible for sports policy, has developed the following hierarchy of sports events²¹, including both amateur and professional sport competition:

- Level 1 – Major international events, single or multi-sport (examples – Commonwealth Games, Olympic Games, Boston Marathon);
- Level 2 – Small international events (examples – Bell Capital Cup);
- Level 3 – National and Inter-Provincial events (examples – Vanier Cup, Memorial Cup, Grey Cup);
- Level 4 – Intra-provincial and open events; and
- Level 5 – Local Event (examples – curling bonspiels, amateur sport league tournaments).

²¹ Sports Canada, Department of Canadian Heritage

4.3.3 Recommendations

Best Fit Markets

Based on the current inventory of sport facilities and venues within YAS, it is recommended that the region pursue amateur sport tourism competitions and events in the sports of:

- Ice hockey;
- Baseball and softball;
- Curling;
- Golf; and
- Sport Fishing – tuna and shark.

Atlantic Canada and Nova Scotia represent primary geographical markets for Level 3 (Inter-provincial) and 4 (Intra-provincial) events.

Level 3 events should also consider the opportunities in Portland and Bar Harbor given the existing ferry connections.

Event Attraction and Management Capacity

Key to the success of any sport tourism initiative is the local sport organizations and their capacity and interest in pursuing sporting events.

It is recommended that YAS tourism industry stakeholders work with municipal recreation staff in all 4 region municipalities to prepare a comprehensive inventory of

sport facilities in the region and identify the facilities that are suitable for hosting Level 3 and Level 4 sport tournaments and events.

It is recommended that a sport tourism working group comprised of sports organizations, facilities, municipal recreation staff and accommodation representatives be formed to develop a sport tourism product development strategy for pursuing and hosting sports tournaments and events. The first task of such a group would be to prioritize the opportunities based on quality of facilities and sport organization interest and capacity.

In support of the working group, it is recommended that SWSDA consider the establishment of a staff sales coordination function for sport tourism initiatives – this function could also incorporate the coordination of festivals and events tourism in the region (see Section 4.10, Music and Culture, below).

Facility Enhancement and Expansion

It is recommended that the sport tourism product development strategy include a long-term plan for enhancing/upgrading/expanding facilities to better meet the current and future needs of Level 3 (inter-provincial) and 4 (intra-provincial) events.

4.4 Art & Craft

4.4.1 Context

Small towns and cities facing downtown revitalization dilemmas are discovering that arts and culture can be a catalyst and an investment incentive to developers and entrepreneurs.

Many artists are leaving metropolitan areas for small town safety, affordability and stronger sense of community.

Improvements in telecommunications and transportation have allowed these creative professionals to reside full or part-time in small towns and yet remain connected to their agents, galleries and customers. In addition to visual artists, performing artists, arts centre administrators, musicians, writers and theatre directors have discovered small towns as ideal places to pursue their careers.

At the same time tourists and travellers increasingly purchase art while traveling (rather than primarily at urban art galleries) and seek out local performances.

With financing options more limited in small towns and cities, arts related development initiatives in response to arts community growth are typically based on incremental steps rather than the planning and developing big projects. Some of the

techniques to stimulate entrepreneurial investment have included:

- Renovating old buildings for reuse as art centres – Charlottesville Virginia and Bozeman Montana turned old high schools into incubation centres for creative businesses; Salida Colorado reused a power generating plant as an arts centre; Durango Colorado turned a car dealership building into a community arts centre and Burlington Vermont did the same with an old firehouse; Ephrata Pennsylvania converted a former shoe factory into an ArtsWork factory with studios and display areas for local art;
- Instituting ‘percent for arts’ programs – a program in some municipalities where 1% of the cost of new development is collected as a development charge by the municipality and allocated to support arts’ programs;
- Implementing tax incentives to encourage establishment of art galleries and artists lofts in certain neighbourhoods;
- Interest rate subsidies;
- Providing ‘below market rent’ apartments for artists – creating a more desirable place to live for empty nesters or working professionals who come as

market rate buyers and effectively subsidize the artist’ apartments;

- Ensuring building codes allow for live/work space for artists in unoccupied second and third floor story levels of downtown buildings;
- Creating special zoning changes;
- Using federal housing tax credits as a component of financing packages with a long term compliance period (15-30 yrs) to ensure the artists are not just used as a temporary tool for economic revitalization; and
- Enabling developers to access mailing lists of arts councils and organizations to help in targeting their markets.

Arts projects and revitalization efforts seem to work best when they reflect the personality and character of the destination – not a formulaic approach. Arts related projects often spark adjoining entrepreneurial investment in complementary facilities and services such as restaurants and art schools. Arts has demonstrated it has the capacity to serve as an engine for economic development.

Arts can also add value to a place by helping to shape what people see and do – creating art filled environments in downtown areas that provide interplay of contrasting

elements, such as lively and quiet places, bright and softly lit places and places offering predictable and unexpected experiences. Creating arts districts can attract business investment, revitalize struggling neighborhoods and areas, and attract tourists.

4.4.2 YAS Opportunity

Arts and crafts can be a significant tourism draw and activity. The TAMS database provides some insights into the scale of the market interest as follows:

- In 2004/05 18% of total Canadian overnight travellers (3,859,904 travellers) visited art galleries on their trip;²²
- A total of 36% of all Canadian overnight travellers shopped or browsed in local arts and crafts studios or exhibits (7,596,491 travellers);²³

²² Travel Activities and Motivation Survey – Motivations of Canadian Residents: An Overview, Ontario Ministry of Tourism and Recreation, 2007

²³ Ibid

- A total of 14% of all US overnight travellers (24.7 million travellers) visited art galleries;²⁴ and
- A total of 32.5% of all US overnight travellers (57.2 million) shopped or browsed through arts and crafts studios or exhibits.²⁵

In addition, as reported in Section 2.2.2 above, according to the results of the 2004 Nova Scotia Visitor Exit Survey, during visits to the province, 76% of YAS visitors visited a craft shop or studio while 28% visited an art gallery. For both, these were higher levels of participation than the provincial average (56% and 17% respectively).

There are a number of additional key factors that suggest there are significant arts and craft development and marketing opportunities in the YAS region:

- There is already a very strong arts and crafts sector throughout the region with many galleries, studios and shops;
- The more laid back atmosphere, relatively pristine environment, and relatively inexpensive living

²⁴ Travel Activities and Motivation Survey – Motivations of U.S. Residents: An Overview, Ontario Ministry of Tourism and Recreation, 2007

²⁵ Ibid

opportunities found in the YAS region lends itself to attracting artists; and

- The living and historical Acadian culture plus the British history in the Yarmouth area plus the local Mi'kmaq culture all provide opportunities to create a strong and unique arts culture in the region.

With a proactive strategy to make the region a more compelling place to live for artists the YAS region could become a strong arts and culture travel destination.

4.4.3 Recommendations

Inventory Database

It is recommended that as an immediate action, a comprehensive database of existing arts and craft facilities/studios, experiences and resources within the region be compiled and maintained. This will support web-based trip planning, package development, destination promotion (including positioning YAS as a key provincial arts and craft node), and the planned new YAS Visitor Guide (2009, in cooperation with the Vanguard newspaper) for use by in-market visitors.

Experience Enhancement

It is recommended that existing art and craft attraction operators form a working group, possibly even an artists' cooperative, to

explore and support the enhancement of existing experiences through packaging and coordinated promotion, as well as expanding available programming or "learn to ..." experiences to tap into the learning vacations traveller segment.

Infrastructure Enhancement

It is recommended that in consultation with the arts community and artists, a strategy and plan for the development of an artists community or communities within YAS – especially in and around the Yarmouth waterfront and downtown (see Section 9, Next Level Catalyst, following) – be developed and implemented. Key elements of the strategy and plan development should include:

- Investigate possible arts districts or areas for zoning as artist live/work spaces;
- Identification of possible old public buildings that would lend themselves to creation of artist live/work spaces;
- Evaluate the opportunities for creating incentives to attract artists to the community (i.e. tax incentives, arts development zone etc); and
- Develop and implement a communication plan for artists to begin profiling the existing artist community and the opportunities and enticements for

attracting artists to relocate and live in YAS.

4.5 Auto-Touring

4.5.1 Context

The National Scenic Byways program in the US (www.byways.org) is perhaps the most advanced program in terms of designating and branding highways or roadways to create destination roadways and encourage auto-touring. This program is a nationwide effort to identify, promote and manage the country's special highways and roads.

Examples of scenic byways that have become significant attractions in their own right include the Blue Ridge Parkway in Virginia and North Carolina, A1A Scenic and Historic Coastal Byway in Florida and the Creole nature Trail in Louisiana. In addition there are a number of lesser-known scenic byways that illustrate the scope of auto touring experiences that can be offered. These include:

- Acadian Byway in Maine (www.byways.org/explore/byways/13791);
- Amish Country Byway in Pennsylvania (www.byways.org/explore/byways/13793);

- Billy the Kid Trail in New Mexico (www.byways.org/explore/byways/2062); and
- Selma to Montgomery March Byway in Alabama (www.byways.org/explore/byways/2050).

Every roadway that is designated an All-American Road or a National Scenic Byway must possess outstanding qualities from one or more of the following six intrinsic characteristics²⁶:

- Scenery – in terms of how memorable, distinctive, uninterrupted and unified they are;
- Natural ecological features;
- Historic features of interest;
- Cultural attributes;
- Archaeological sites of interest; and
- Access to recreation resources and recreation use of the roadway corridor (i.e. by cyclists).

Research by a number of the State Byway Commissions clearly demonstrate that

²⁶ National Scenic Byways Program - Intrinsic Quality Handbook: A Community Guide to Inventorying and Evaluating Scenic Byways, National Park Service & Federal Highway Administration, 1996

leisure travellers who chose to travel the byways are motivated by a combination of these same intrinsic values located within the corridor.²⁷ For marketing purposes these intrinsic values and attributes also provide a means to develop theming and a story line for the roadway. This is essentially how an overall touring experience can be created for the visitor, and in turn how the roadway can become a destination attraction, rather than simply functioning as a travel corridor.

The work that SWSDA is doing on developing the Acadian Shores Interpretive Tour (i.e. road signage and interpretive panels and associated marketing materials) is an example of how the scenic byway concept can be applied in YAS.

The existing Nova Scotia Trailways and Scenic Drives program is by design more of a logistical tool to assist visitors in exploring the province. The exception would be the Cabot Trail that offers an iconic auto touring experience comparable to many scenic byways in the U.S.

²⁷ Scenic Byway Development on the Oregon Coast: Economic Benefits and User Preferences, 1990; final case study for the National Scenic Byways Study – New Hampshire Scenic Byways: Economic Benefits, 1990.

4.5.2 The YAS Opportunity

Given that 61% of all Nova Scotia visitors entered the province by automobile in 2008²⁸, it is apparent that an opportunity exists for YAS to attract auto-touring visitors from all of the provinces key markets. In addition, the ferry connection to New England presents a particularly strong opportunity – as in offering the first auto-touring experience -- for the region to attract a portion of U.S. market that is visiting Nova Scotia.

The TAMS database provides some useful insights into the auto touring market. Based on a profile of those American and Canadian overnight travellers that had taken a self guided overnight tour staying in different locations within the past two years (a large proportion of which are likely to be by auto) there are significant numbers in Atlantic Canada and Massachusetts²⁹:

- Overall this segment represents 17% of all Canadian travellers and 10% of US travellers

²⁸ Nova Scotia Department of Tourism, Culture & Heritage

²⁹ Custom data analysis of Travel Activities and Motivation Survey database, commissioned by the Tourism Company, 2008

- 185,000 in Atlantic Canada with close to 20% in Halifax
- Large numbers in Quebec particularly in Montreal (1,049,507 – 29% of total in Canada)
- Large numbers in Ontario particularly in Toronto (1,202,011 – 34% of total in Canada)
- Relatively large number in Massachusetts particularly in Boston (429,570)

Some of the activities this market is interested in while on the touring trip include³⁰:

- Sunbathing and swimming in lakes or the ocean;
- Hiking – same day excursions;
- Visiting nature parks – national, provincial etc.;
- Visiting museums;
- Strolling around a city for its architecture and buildings;
- Visiting known historic sites;
- Dining in local food restaurants; and
- Staying in lakeside or riverside resorts, seaside resorts or public campgrounds.

³⁰ Ibid

These are all activities offered in the YAS region.

A total of 13% of Canadian self-guided touring travellers and 3.4% of American self-guided touring travellers visited Nova Scotia in 2004. A total of 7.4% of American self-guided touring travellers visited Maine.³¹

Within the YAS region there is a wealth and diversity of natural and cultural heritage resources, including unique stories, to develop scenic byways that offer a compelling auto-touring experience. The region is long and narrow and lends itself to touring but it is far from being market ready for this experience. The key challenge in the region is that many of the sites of interest, key attractions and support that would comprise auto-touring routes are currently difficult to find.

4.5.3 Recommendations

YAS Route Network

It is recommended that a tourism industry working group be formed to develop a plan for a network of auto-touring experiences, modelled on the U.S. National Scenic Byway Program. In concept the network would resemble a hiking trail network in a national

³¹ Ibid

or provincial park, featuring a few arterial or main routes and a series of loops that connect to/from the main routes. Using this network concept, the Acadian Shores Interpretive Tour would be an arterial route. High potential loops include, but are not limited to:

- Cape Forchu/Yarmouth Harbour and waterfront;
- Catholic religion – churches & cemeteries;
- Tusket Islands and Tusket River watershed;
- YAS fishery; and
- Rum running history.

Route Development

Once the auto-touring network plan is complete, it is recommended that a working group of tourism industry stakeholders, supported by SWSDA staff, be formed for each route or byway to lead and coordinate the development and implementation of each route. Beyond mapping, developing interpretative materials, and signing a route, the working groups would engage with tourism operators to begin offering a range of tour options and add-on tours options i.e. boat tour connections.

Touring Enhancements

Once the auto-touring network plan is complete, it is recommended that SWSDA, in consultation with touring route working groups, explore the feasibility of developing and implementing touring experience enhancements including, but not necessarily limited to:

- Use of hi-tech interpretation enhancements such as GPS linked CDs or MP3s for use in autos or on iPods and MP3 players;
- Environmentally sustainable touring options such as bicycle, smart car and hybrid car rentals; and
- Ride and Drive packages for pedestrian passengers on the ferry and Fly and Drive packages for passengers arriving by air.

Nova Scotia Circle Tour

As a key to attracting Nova Scotia visitors who enter the province by automobile via New Brunswick, or by air via Halifax, to travel to YAS for auto-touring experiences, it is recommended that the region, in partnership with adjacent regions, engage with the province to develop and promote the concept of a Nova Scotia Circle Tour. This province wide route could be modelled on the Ontario/Michigan Lake Superior Circle Tour (www.lakesuperiorcircuitour.com)

4.6 Coastal Hiking

4.6.1 Context

With the ageing market in North America there is forecast growth in soft adventure activities like coastal hiking packaged with complementary experiences to provide a comfortable blend of nature, activity and culture.

Travellers motivated by hiking (far more likely day hikes than wilderness overnight hikes) are typically higher yield (spending slightly more than the average and staying longer) and somewhat younger than the average traveller (35-45 yrs)³².

4.6.2 The YAS Opportunity

According to the TAMS database. in 2004/05:

- 23% of Canadian overnight travellers (4.8 million) went on a same-day hiking excursion while on a trip³³; and

- The comparable number for the U.S. was 16.8% of total American overnight travellers (29.6 million)³⁴.

The number of travellers participating in overnight wilderness hiking trips was lower but still significant – 7% of Canadian travellers (1.5 million) and 4.2% of American travellers (7.4 million). For about 25% of these travellers hiking was a motivating factor for their trip.

Research by Nova Scotia Tourism, Culture and Heritage confirms that opportunities for hiking can be a main or support motivating factor for people who select Nova Scotia as a destination.³⁵

At present there is limited organized and signed coastal hiking route development and marketing in the YAS region. Yet the region's long and diverse seacoast offers significant potential to develop coastal hiking trails. Existing coastal walking paths, and informal provide a starting point for further developing this product to meet market expectations and needs.

The Bruce Trail approach along the Niagara Escarpment in Ontario could be a good

³² Custom data analysis of Travel Activities and Motivation Survey database, commissioned by the Tourism Company, 2008

³³ Travel Activities and Motivations of Canadian Residents: An Overview, Ontario Ministry of Tourism, 2007

³⁴ Travel Activities and Motivations of U.S. Residents: An Overview, Ontario Ministry of Tourism, 2007

³⁵ The Hiking Travel Market: Emerging Markets Bulletin, Nova Scotia Department of Tourism, Culture and Heritage.

model for trail development and maintenance and securing private land-access agreements.

4.6.3 Recommendations

It is recommended that a working group comprised of tourism industry stakeholders, municipal planning and recreation staff and coastal hiking enthusiasts be assembled to develop a plan for consolidating existing coastal trails and pathways, expanding existing trails and developing new trails. The overall objective is to develop a market ready network of coastal hiking experiences that should include:

- Formal, legal land access permissions and agreements;
- Proper signage – wayfinding to locate trails and wayfinding and interpretive signs along trails;
- Packaging with accommodation to offer Inn to Inn or B&B to B&B hiking programs where the opportunity exists;
- Availability of local guides and self guided brochures; and
- Geo caching sites along appropriate trails to enable marketing to this niche market segment.

4.7 Culinary

4.7.1 Context

In 2004 a Nova Scotia Cuisine and Wine Tourism Strategy was completed after being identified as a priority in the provincial long-term Tourism Product Development Plan.

In 2005 the province of Nova Scotia retained consultants to develop a strategy for Culinary Tourism and Agri-Tourism. The report proposed the following definition for culinary tourism:

Culinary experiences of quality that are uniquely representative of Nova Scotia's culture, heritage, lifestyle and/or food and make extensive use of Nova Scotia grown/harvested foods and ingredients.

The report also recommended that a hierarchy of experiences based on scope, level of intensity and the level of interpretation/learning offered be applied. Only Tier 2 or higher products would be marketed by the province – i.e. those products that have appeal to domestic and out-of-province tourists. The following product categories would be included:

- Culinary experiences and culinary tourism
- Winery tourism

- Agri-tourism
- Quality foods – specialty retail outlets/markets
- Quality foods – distribution system and export

Cuisine is now one of the 6 core experiences being marketed by Nova Scotia Tourism.

4.7.2 The YAS Opportunity

The TAMS database does not specifically cover past travel participation in culinary

tourism but there are a number of useful insights into the US and Canadian market interest in aspects of culinary tourism, as illustrated in Figure 11.

In part the region is already beginning to capitalize on the opportunity through programs like the ‘Savour the Local Sea’ restaurant program, while some individual operators are serving a culinary tourism market with proprietary product – for example Trout Point Lodge with its culinary vacation programs.

There is a larger opportunity given the following attributes of the region:

- The YAS region has one of the most diverse and healthy fisheries in Atlantic Canada;
- There is a small scale but unique agricultural sector in the region;
- The Acadian food culture is present throughout large parts of the region; and
- Given the large protected wilderness areas there is potential for wild food harvesting.

There is potential to expand existing programs and develop significant new culinary programs and products with broader involvement of the fisheries and agricultural operators, accommodation

Figure 11: Selected Characteristics of Culinary Tourism

Activity during overnight trips in 2004/05	Percentage & number of Canadian travellers	Percentage & number of American travellers
Cooking/wine tasting courses	722,214 (3%)	7.1 million (4.0%)
Cooking school	73,197 (less than 1%)	1.0 million (0.6%)
Country Inn or resort because it had a gourmet restaurant	1.0 million (5%)	3.4 million (1.9%)
Shop or browse at a gourmet foods shop	3.6 million (17%)	27.0 million (15.3%)
Aboriginal cuisine	666,069 (3%)	4.5 million (2.5%)

Source: *Travel Activities and Motivation Study 2004-05*, Statistics Canada

operators, restaurants and food producers found in the region.

4.7.3 Recommendations

New Product Offering

It is recommended that a working group of key players in the culinary and agricultural sector such as the University, the local Acadian community, restaurant sector, and fishery be formed to identify and develop new culinary experiences that build on Savour the Local Sea, “slow food”, Acadian cuisine and organic foods

Culinary Discovery Centre

It is recommended that in the longer-term, consideration be given to establishing a Culinary Discovery Centre where local chefs can develop new signature dishes, visitors can participate in learn to cook programs and visitors are able to sample YAS signature dishes. Such a facility should be located on the Yarmouth waterfront, possibly as part of the recommended Yarmouth Seaside development (see Section 9).

4.8 Historic Sites & Buildings

4.8.1 Context

Historic sites and buildings can be a key driver for heritage enthusiast travellers,

particularly when the site or building has achieved iconic status – think of Stonehenge in the U.K., the Taj Mahal in India and the Versailles Palace in France for example. However, less well-known historic sites and buildings, when their stories are presented in a compelling way, can also be a strong motivator for travellers seeking heritage experiences.

A site and artifact condition and treatment continuum with 4 nodes can be used to identify substantive differences in types of historical-based tourism development opportunities.³⁶ These opportunities include:

- Preservation of a site and/or artifacts;
- Restoration of a site and/or artifacts;
- Re-creation of a site and/or artifacts; and
- Commemoration of a site.

A range of visitor experience options can be identified for each type of opportunity while meeting dual objectives of protecting the integrity of a site and/or artifact (where applicable), and offering a range of ways for visitors to interact with an opportunity that would provide motivation for visiting.

For the first two opportunity nodes, where a preserved or restored historical site/feature

³⁶ the Tourism Company, 2007

exists, the visitor experience options differ in the level of visitor interaction with the site, and include the following:

- **Off-site viewing** or looking at a site and/or artifact from a distance but not entering onto the site nor touching the artifact(s) – no interaction;
- **On-site self-guided tours** where visitors explore a site and or examine an artifact with **minimal assistance**, typically one or more of a map, interpretive pamphlet, guide book or interpretive panel(s) – limited interaction, initiated by the visitor, directed and controlled by site management;
- **On-site guided tours** where visitors explore a site and or examine an artifact with **assistance provided** either through technology (audio guide, motion activated audio and video, etc.) or interpretive guides (human contact) – moderate interaction possible, particularly if human guide, initiated by the visitor but directed and controlled for the most part by site management;
- **On-site animation** such as costumed interpreters, historical theatre, re-enactment, etc., where visitors are encouraged to immerse themselves cognitively and in a sensory way, in a previous time and setting that typifies

how the archaeological site and/or artifact would have presented – substantial interaction possible, initiated and to some extent directed and controlled by the visitor within parameters established by site management i.e. Acadian Village;

- **On-site participatory** and interactive programs where visitors are invited and encouraged to go beyond cognitive and sensory immersion to actual physical participation in events and activities typifying the operation of a site and/or artifact in its original state – full interaction possible, initiated, directed and controlled by the visitor within parameters established by site management.

For the third opportunity node, a re-created site and/or artifact(s), “off-site viewing” is not a necessary or appropriate option, while the other options appropriate to preserved and restored sites are applicable.

For the fourth opportunity node, commemoration, the range of options changes substantially given the absence of a preserved, restored or recreated site and/or artifact(s). The visitor experience options include:

- **On-site or nearby museum or interpretive centre** which can interpret

a single theme or multiple themes with a wide variety of types of displays and programs;

- **On-site or nearby interpretive plaques or kiosks** which typically mark the location of an historically significant site and/or event while providing interpretive information, usually as written text on a display board or panel;
- **On-site or nearby monument or artistic impression** which typically marks the location of an historically significant site and/or event while providing symbolic or artistic interpretive content;
- **On-site or nearby festival, event, performance or demonstration** intended to celebrate and/or provide interpretive information about a historically significant place, event or person(s); and
- **Design interpretation** that seeks to commemorate a historically significant era or place through the use of design elements that link present day places or buildings with the era or place.

There are a number of programs in place throughout Canada, including Nova Scotia, for the preservation and adaptive re-use for tourism purposes of historic sites and

buildings. These include, but are not limited to:

- Section 22 of The Nova Scotia Heritage Property Program specifically authorizes the Minister of Tourism, Culture and Heritage and local municipalities to provide financial assistance for the restoration or renovation of registered heritage properties.
- Victoria, British Columbia's Building Incentive Program (BIP) that provides financial assistance to owners of commercial or institutional heritage designated buildings to assist with façade restoration; structural improvements, upgrading required by building codes, and other rehabilitation costs. Grants may cover up to 50% of the cost of eligible heritage work, up to a maximum of \$50,000 per project.
- A more modest program available in Niagara Falls, Ontario, is highlighted in the adjacent sidebar.

4.8.2 The YAS Opportunity

The 2005-06 TAMS Study provides some useful insights into the importance of historical sites and exhibits for both tourists and the general population:

- 36% of total Canadian residents and 39% of travellers indicated that visiting

historic sites/heritage buildings was an entertainment activity they participated in frequently or occasionally. These participation rates were higher than the rates for live theatre, museums, professional sports events or zoos or aquariums.

- Participating in activities related to exhibits, architecture or historic sites (54% of Americans and 57% of Canadians) was a very common activity for travellers ranking above festivals and events, spectator sports and theme parks.

The YAS region has an established inventory of historic site and building-based attractions (see Section 2.2.4, above). More importantly, it has a tremendous range and variety of additional historical sites and buildings and related stories that have not yet fulfilled their potential as compelling visitor experiences. Many of these are located in the Town of Yarmouth in two key clusters:

- The Sea Captains' homes located in a designated heritage district; and
- The Yarmouth waterfront.

4.8.3 Recommendations

Sea Captains' Homes

It is recommended that a working group of Yarmouth tourism stakeholders be formed to engage with the Yarmouth County Museum & Archives staff to research and document some of the more interesting Sea Captain's stories and then further develop the historical district walking tour with an enhanced interpretive approach. Initiatives to consider include:

- Increased number of interpretive panels and plaques;
- Smart phone mapping and messaging applications such as murmur (www.murmurtoronto.ca);
- On-site guided-tours (with costumed guides); and
- GPS enabled audio tours.

It is recommended that the working group also meet with the Town planning department to identify and evaluate options for creating incentives for the preservation and adaptive re-use of more of the Sea Captain's homes and other significant historical buildings in town.

Yarmouth Downtown

It is recommended that a working group of Yarmouth tourism stakeholders be formed

to engage with Town Planning and the Port Authority (and engaging/retaining the necessary creative skills) to prepare a redevelopment plan for the Yarmouth downtown core area. Key elements of the redevelopment concept should include, but not necessarily be limited to:

- Through a combination of preservation, restoration and recreation of historic buildings, as well as design interpretation for the streetscape, theme the downtown as “seaports of the world” to tell the stories of destinations visited by Yarmouth and area ships during the late 1800’s and early 1900’s;
- Encourage artist live/work space in old buildings or unused spaces, to create pedestrian friendly areas and attract speciality retail (see also Section 4.4, Art and Craft, above);
- Through public art installations commemorate and interpret the destinations and cargo of the historic Yarmouth shipping trade; and
- Physically and thematically link the redeveloped downtown to the Yarmouth waterfront (see also Section 9, Next Level Catalyst) and the historic sea captains’ home district.

4.9 Meetings & Retreats

4.9.1 Context

The business market is a critical complement to all the identified leisure market segments, often delivering overnight visitors during slow leisure periods or the off-seasons. This is particularly evident in YAS for a number of inn and B&B properties.

To assist in pursuing this market the Room Levy group have allocated to employ a YAS Group Sales Manager. This position will be responsible for soliciting new business from corporate groups, associations, meetings and conferences as well as tour groups and certain leisure niche markets. The position will report through the Tourism Division of SWSDA.

The YAS Opportunity

The YAS region is in a strategic position to be able to draw on the business meetings market from within the province and particularly Halifax, but also from Portland and Bar Harbour capitalizing on the ferry and air connections. New Brunswick presents another opportunity given the ferry service Digby.

There is a good range of products and facilities in the region that could be positioned in the small business meetings

and retreats segments as well as larger meetings and conventions. Many – not all -- of these operators already pursue the market, but not in a coordinated regional approach. Information on some facilities that could support meeting events, such as community meeting halls, is not readily available.

4.9.2 Recommendations

Database

To support the efforts of the YAS Group Sales Manager, it is recommended that a comprehensive database of accommodation and meeting properties, including detailed data on the scope and scale of facilities and services offered, be developed and maintained.

New England Meeting Package

It is recommended that the YAS Groups Sales Manager coordinate the efforts of operators interested in attracting the New England meetings market, and Bay Ferries, in the development of a ‘walk-on walk-off’ meetings. The package should include:

- Ferry transportation (as pedestrians) to and from Yarmouth;
- Reserved group seating and refreshments during the ferry crossing;

- Ground transfers to and from accommodation and meeting facilities in YAS;
- Accommodation, meeting facilities and services; and
- As an option, customized YAS tour itinerary and preferred car rental rates for those who may want to explore YAS.

4.10 Music & Dance (Culture)

4.10.1 Context

Music and dance can be a major travel motivator and is recognized as a prime reason that many visitors select Nova Scotia for a leisure trip. The province has a very high quality and unique music scene as evidenced by such well-known events as Celtic Colours, DRUM and the Stan Rogers Festival.

The Province of Nova Scotia promotes Music and Culture as a core tourism experience and strives to position the province as the Music Capital of Canada.

Festivals and events are one of the most common and popular venues for tourists to experience the music and culture of a destination. They can be powerful trip motivators. For example, *Le Congrès mondial acadien (CMA)* is an international event organized by la Société nationale des

acadiens held every five years, during which Acadians from around the world are invited to gather, to celebrate, to study, to share and to remember their Acadian identity. In 2004, the YAS region hosted this event, and as illustrated in Figure 12, it generated a substantial number of visitors (approximately 43,000) to the region.

Atlantic Canada has the highest festival attraction rate of any Canadian region with over 1,100 festivals and events on the annual calendar. With an aging population in the US and Canada the interest in festivals and events particularly those which feature different cultures and music and dance only stands to increase in importance.

Figure 12: CMA 2004: Origins of Family Gathering Participants

Region-of-Origin	Number	%
Nova Scotia	21 585	50%
New Brunswick	6 596	15%
NL and PEI	1 510	4%
Quebec	2 571	6%
Ontario	2 254	5%
Western Provinces	1 179	4%
New England	3 071	7%
Louisiana	2 271	5%
Other U.S. States	1 886	4%
France	72	0.2%
Other	51	0.1%
Total	43 046	Rounded off to 100%

Source: CMA 2004 Case Study, Atlantic Canada Cultural & Economic Partnership (ACCEP). Heritage Canada. 2005

4.10.2 The YAS Opportunity

The TAMS database identifies the proportion of US and Canadian travellers in 2004/05 who attended a music festival or an ethnic festival while on a trip³⁷:

- 6% of American travellers (10.7 million) participated in music festivals while traveling – 50% were motivated to travel to the destination by the music festival;
- 9.7% of American travellers (17.1 million) participated in ethnic festivals;
- 7% of Canadian travellers (1.5 million) participated in music festivals – close to half were motivated to travel by a music festival; and
- 4% of Canadian travellers (slightly less than 1 million) participated in ethnic festivals.

The Ministry of Tourism, Culture and Heritage Bulletin on the Music Travel Market suggest music travellers to Nova Scotia are looking for:

- Live east coast music;
- Authentic experiences;
- Opportunities to meet and interact with local people;

³⁷ Travel Activities and Motivation Study 2004-05, Statistics Canada

- Readily available information on where to find the music experiences, how to buy tickets, and how to get there; and
- Interactive experiences – i.e. dancing.

Music and dance are elements of culture that are strong in the YAS region, particularly with respect to its Acadian heritage in Clare and Argyle. For the most part, they are experienced by visitors at festivals and events in all parts of the YAS region.

One of the high potential experience market opportunities for the YAS region to pursue is the Acadian experience market, attractive to both those of Acadian descent and those with an interest in other cultures and more particularly Acadian culture. Through festivals and events and in particular music and dance the region can showcase its unique living Acadian culture with a vibrant past.

In Atlantic Canada alone there are in the order of 300,000 people of Acadian descent. Throughout the world there are somewhere between 2 to 3 million Acadians. Figure 13 presents a summary of the size of the Acadian market in different geographical areas and presents an indication of the potential for the YAS region to attract visitors from each that are interested in music and dance.

Figure 13: Attendance & Economic Benefits of CMAs

CMA Event	Benefits (based on total participants for all activities)
1994, South East New Brunswick	Attendance – 200,000 The first CMA was hosted by 9 local municipalities were involved, 60 employees were hired, 80 conferences and 81 family reunions were held, 150 cultural and artistic events took place, and all within the time frame of two weeks! It is estimated that some 3 million dollars was invested into the region by this organization.
1999, Louisiana	Attendance -- 309,450 Integrated with the Franco Fête celebrations to mark the 300th anniversary of French presence within the State, the second Congrès hosted 61 family reunions, and saw the twinning of many Louisiana villages with their Nova Scotia or New Brunswick counterparts and kept visitors entertained with a wide range of cultural and musical venues all across the state.
2004, Nova Scotia (YAS)	Attendance -- 300,000 The 2004 CMA marked the 400th anniversary of the arrival of the French in Acadie and Samuel de Champlain's first explorations. It is estimated that over 250 000 people participated in the largest cultural event ever seen in Nova Scotia, including 100 000 visitors from outside the province. It is known that approximately 43 000 people attended the family reunions and that slightly more than half of them, i.e. 21 461, were from outside the province (see next table). Some 150 people worked directly to organize events in Nova Scotia, and another 150 to 200 worked on various productions. Total cost : \$ 6 million.
2009, Acadian Peninsula, North East New Brunswick	Attendance -- 300,000 to 350,000 Over 60 family reunions confirmed. Many small communities involving over 2,500 volunteers. Staff of 25 people. Potential 125 indirect job creation. Total operating budget of \$12 million (over 6 year period of organization). Estimated economic spin-offs of \$33 million.

Sources:

1994 & 1999 Lucie LeBlanc Consentino, Acadian & French Canadian Ancestral Home

2004: Case Study, Atlantic Canada Cultural & Economic Partnership (ACCEP), Heritage Canada, 2005

2009, Official CMA 2009 website and article in Progrès Magazine, Volume 5. No. 2, July – August 2008

Figure 14: Size and Potential of Acadian Markets

Province/State	Estimated population of French/Acadian descent	Assessment of Potential
New Brunswick	232,980 (33%)	Strong potential to travel to NS and various areas
PEI	5,345 (0.4%)	Limited number, but in proximity
Nova Scotia	36, 540 (4.0%) In 8 major areas: Halifax, Annapolis Valley, Truro, Bridgewater, Isle Madame, Sydney Cape Breton and South West which includes: Argyle - 8,700; Clare - 10,000	Pull in from other Acadian Regions Large population base in metro Halifax (385,000)
Newfoundland	2, 200 (0.4%)	Very limited - extensive travel
Québec	Nearly 6 million (Over 87%) French (mother tongue) Estimated that more than 1 million are of Acadian descent	Strong potential; need to be nurtured; Quebecois traveling to Maritime Provinces are over 300,000 annually -- YAS Region receives less than NS
Other Canada (estimates)	Ontario 530,000 Manitoba 43,000 Saskatchewan 16,000 Alberta 59,000 BC 60,000 Territories 2,500	Ontario would offer the highest potential depending on the number of French-speaking travelers already coming to Nova Scotia plus a certain proportion which could be interested in the Acadian Product, particularly Ottawa
USA: Louisiana	198,784 (2000 census)	Medium, lot of interest. Distance and lack of direct air travel limits the number of tourists
USA: New England States	Maine =110,000 of French Canadian descent Mass= 310,512 of French Canadian descent Connecticut= 109,550 of French Canadian descent New Hampshire= 127,753 of French Canadian descent Estimate of over 100,000 of Acadian descent	Strong potential because of family links; need to foster the development of this market. Ferry services are necessary for the YAS for the development of this market. Approximately 1/3 of USA visitors to Nova Scotia are from the New England States (100,000 / year)
France	Estimate of 50 000 people of Acadian descent	Limited; to partner with Québec that gets around 350,000 visitors from France every year (over 80% arrivals); * NB & NS: receive 5,000 each

Sources: US Census, Statistics Canada (2006) and estimates of la Société Nationale de l'Acadie and ACOA Official Languages Working Group (2007)

4.10.3 Recommendations

Festivals and Events

It is recommended that YAS continue to focus on festivals and events as the primary venue for offering music and dance experiences to visitors. SWSDA should foster the development and growth of existing and new festivals and events with a strong tourism component.

It is recommended that a working group of tourism industry stakeholders, including current festival and event organizers, be formed to identify current festivals and events with potential to shift from primarily community-focused to tourist events.

It is recommended that the current and highly successful Musique de la baie program be expanded to encompass venues throughout YAS.

Build the live entertainment (kitchen parties, local venues, music hot spots) them throughout the whole region, making it easily accessible to visitors – ‘there is music everywhere.

“Learn to” Experiences

Create music and dance learning experiences for visitors – mini-camps, workshops, packages, tie in with second language training at the University, at

venues such as the Village historique acadien in Pubnico, and workshops/presentations at the soon to be open Rendez-vous de la Baie

Signature Events

Develop some type of live Acadian music and dance production that would also serve as an entertainment attraction running on a regular basis throughout the season - this could become the weekly event presented by the Acadian Music and Dance Learning Camps that would involve professionals and amateurs in recurring roles but would also be simple enough to encourage audience participation by giving camp participants roles as extras and by using makeshift instruments to create a mini-tintamarre with the full audience at the end of the show

In the longer term host a major event focused solely on International Music and Dance competitions eg. Sommet de la dance acadienne

4.11 Ship & Boat Building Heritage

4.11.1 Context

Interest in current industrial heritage can be a travel motivator, particularly when it is combined with interest in an industry with a romantic and colourful past, such as ship and boat building.

In the minds of many, Atlantic Canada is readily associated with ship and boat building in both the past and the present. Nova Scotia's Bluenose Schooner is perhaps one of the mostly widely known products of the province's ship and boat building industry.

The YAS Opportunity

The YAS region of Nova Scotia has a long and rich connection to the ship and boat building industry. As a tourism resource, this heritage presents an opportunity to develop a travel experience that blends the past and the present within the region while complementing historic sites and buildings, particularly the Sea Captain's homes in Yarmouth.

Key resources with the region include:

- The A.F. Theriault shipyard in Clare where ad hoc informal interpretive tours already occur; and
- The Yarmouth County Museum & Archives with its records and photos of ships and boats built within the region.

The new branding of the YAS region *Start here....An Experience Shaped by the Sea* ties in well with the ship/boat building theme.

Recommendations

It is recommended that SWSDA support and encourage A.F. Theriault shipyard to develop one or more formal interpretive tours that can be delivered on an as requested basis (with some advance notice) year round, and on a scheduled basis during the peak tourism season.

It is recommended that a working group of tourism industry stakeholders be formed to explore the feasibility of developing a "build-a-boat" program, possibly on the Yarmouth waterfront or at Village Acadien) where visitors would participate in building a replica historic boat or ship -- that once sailed from Yarmouth -- over the course of the spring/summer/fall. The finished boats could become part of a floating exhibit in one of the region's many harbours, or each harbour could be come home to one boat thus creating the potential for a historic boat and harbour scenic tour (see Section 4.5, Auto Touring, above).

It is recommended that a working group of YAS heritage boat enthusiasts be formed, likely supported by the Yarmouth County Museum, to explore the feasibility of developing and hosting an event or festival of heritage boat owners and enthusiasts within the YAS region.



It is recommended that the Yarmouth County Museum explore the feasibility of developing of hi-tech/interactive ship and boatbuilding exhibits to complement their inventory of records and artefacts.



5. Strategic Initiative - Industry Stabilization

5.1 Context

Under current government assistance programs, selective support is available to tourism operators while no assistance is provided to the retail sector. Capital assistance focuses on unsecured repayable contributions tied to sales or other performance measures.

Assistance for studies or the hiring of consultants is based upon a distribution of the costs between the applicant and the program sponsor. The applicant is normally responsible for 25% to 50% of the eligible financing.

The Province of Nova Scotia and Canada follow a coordinated approach to the delivery of assistance programs with regional development agencies (RDAs) acting as partners for service delivery or to ensure the alignment of funding support with local community economic development objectives.

Figure 15 (page 68) lists current sources of financing assistance. All of these assistance programs are framed by the following assumptions:

- The applicant has identified a pre-determined need.
- The applicant understands the intent, scope and expected outcomes/outputs of the funding request.
- Funding is linked to an upfront equity contribution or a repayment schedule with defined terms and conditions.

These programs are designed to generate an “audit trail” with deliverables that include a study report or capital projects. The approval process for funding can extend over months and acceptance can be constrained by fiscal year funding cycles and program budgets. In this setting, the current programs cannot rapidly respond to immediate (time sensitive) needs by an applicant. They are also not designed for the current situation facing many YAS tourism operators.

In 2007 SWSDA implemented the Total Market Readiness (TMR) program to assist tourism operators committed to enhancing the visitor experiences they offer to their customers. This is a program that SWSDA intends to continue with the intent of enhancing the overall quality of visitor

Figure 15: Summary of Key Funding Assistance Programs

Program	Comments
Business Development Program	The ACOA (federal) program provides interest free and unsecured loans to small and medium sized enterprises (SME) for competitiveness improvements. Eligible support includes buildings, plant and equipment, site and leasehold improvements, marketing plans, training, productivity improvements, innovation and consultant advice (including business plans and feasibility studies). Funding support for consulting advice is typically in the \$10,000 range.
Seed Capital Program	This ACOA (federal) program provides loans to start, expand or improve a small business. Support for skills training is also available.
Community Economic Development Investment Funds	Nova Scotia Economic Development administers this investment fund that provides investors with accelerated tax benefits. The pool of capital must invest in local businesses and contain a board of directors.
Credit Unions of Nova Scotia – Small Business Financing Program	This joint initiative is administered by Credit Union Atlantic with loan guarantees provided by the Nova Scotia Economic Development. A business plan must be submitted and regular credit lending criteria is followed (including personal security or guarantees). If the business plan is deemed to be weak, then Credit Union Atlantic may require the applicant work with a business mentor that is accessed via the Nova Scotia Co-operative Council. The maximum loan amount is \$150,000 with a term of seven years.
<i>Source: Chris Lowe Planning & Management Group, 2008</i>	

experiences within the YAS region, a key factor in long-term sustainability of a tourism destination area.

5.2 The YAS Need

The YAS tourism economy is in a period of transition from reliance on overnight stays generated by a favourable ferry schedule to a destination chosen by travellers on the basis of the rich, natural and cultural heritage-based experiences offered. Even if all the product development initiatives described in Section 4 above are implemented quickly and supported with TMR and effective destination marketing communications and sales promotion, substantial increases in the number of overnight visitors to the region will not happen overnight. Steady yet modest annual growth is the likely scenario.

For the region to realize growth in overnight stays, capacity in the accommodation, hospitality and retail sectors of the tourism economy must be maintained. If businesses in these sectors are lost, full growth potential is unlikely to be realized. Our research indicates that many businesses in those sectors are struggling to remain open. Although there are attractive future opportunities, many businesses need to get through a current financial crisis resulting

from the substantial and rapid drop in demand over the past 3 years.

Our assessment of the YAS tourism economy has identified the need for an immediate program to assist local commercial tourism businesses to develop short-term survival and repositioning business plans. Implementation of the plans will be supported by the marketing intelligence initiative (see Section 7), which is intended to provide YAS tourism operators with timely, relevant and detailed market demand and performance information.

5.3 Recommendations

It is recommended that the South West Shore Development Authority assume the lead role in setting up YAS Tourism Industry Stabilization Program as a three-year demonstration project with a renewal option. ACOA and Nova Scotia Economic Development should be approached as funding partners to contribute funds from current operating sources. The program should be ready for commercial businesses to participate beginning in May 2009.

Key elements of the program should include:

- Set Up Standing Offers with tourism experts in business plan preparation/execution for tourism businesses. Each Standing Offer should

be \$10,000 based upon negotiated per diem rates, plus expenses.

- Participation in the program from up to 10 commercial tourism operations per year that demonstrate need and that are considered to be of strategic long-term importance to the YAS tourism economy. Preference should be given to accommodation operators.

This program would provide the tourism businesses with access to advisors who have the knowledge, information and contacts to facilitate informed decision making by sector participants. The program would function as a “business doctor” for the YAS tourism sector and include “house calls” where local operators can confidentially discuss their challenges with an expert and then obtain business specific recommendations in the form of a short term business plan.

This service cannot be provided by generalists and will extend beyond the field services of senior government departments or the business mentors offered under the Credit Unions of Nova Scotia – Small Business Financing Program.

We have reviewed available funding programs and the relationship between RDAs and senior government funding organizations in Nova Scotia. Based upon

this review, we recommend the Industry Stabilization Program initiative be included as a business support (business counseling) demonstration project administered by the South West Shore Development Authority. Work under the program should be conducted in a confidential manner on a business specific basis with standing offers for regional or national tourism experts forming the pool of advisors.

The program should have a high profile launch and receive multi-year funding. Annual independent audits should be conducted with adjustments made to enhance service delivery.

6. Strategic Initiative - Industry Development Support

6.1 Context

The current YAS tourism destination development partnership among the four municipal units (Municipality of Argyle, Municipality of Clare, Municipality of Yarmouth, and Town of Yarmouth) and SWSDA started in July 2006 (fiscal 06-07).

The partnership funds four full time positions. The municipal units cost-share the SWSDA Tourism Division manager's salary, while each unit funds a tourism development officer position (one each in Clare and Argyle; the Town and Municipality of Yarmouth provide funds to SWSDA for a third position).

It is clear from our analysis that the four staff positions have been instrumental in developing and implementing many destination development initiatives to date, including:

- Total Market Readiness program;
- YAS Branding;
- Visitor information centre services;
- Acadian Product Development;

- Development and launching of new website (www.yarmouthandacadianshores.com) and expanded web presence;
- Branded trade show booth;
- Development, publication and distribution of a new YAS lure brochure;
- Travel writer program;
- Print media campaign – newspapers and magazines;
- Print media advertisements in Bay Ferries' publications;
- Presence in provincial Doers' and Dreamers' Guide and Southwest Nova visitor guide (2008); and
- Public relations campaign in the Halifax Regional Municipality.

The partnership is now in year three of the original five-year mandate.

6.2 The YAS Need

If the recommendations in this Plan are to be implemented in a timely and effective manner continued full-time staff resources at the current level, are required.

6.3 Recommendations

It is recommended that SWSDA and the four municipalities renew their current destination development partnership agreement for a second five-year term.

Furthermore, in the interests of ensuring continuity for the many destination development initiatives, and to provide a clear signal to YAS tourism operators of municipal support for long-term destination development, that the agreement be renewed immediately.

It is also recommended that the Tourism Division within SWSDA commit to an annual review and renewal of the implementation program for the Destination Development Plan making any needed adjustments or changes in priorities. Establishing credibility and transparency with tourism industry stakeholders is important if the Tourism Division is to continue to provide effective leadership and support for tourism destination development within the region.

7. Strategic Initiative - Marketing Intelligence

7.1 Context

The emerging dominance of the Halifax air traveller market, declines in trans-border visitors (via ferry or road) from the United States and the splintering of mass tourism markets into unique experience-driven segments, places unique challenges on YAS tourism operators.

In today's market Yarmouth & Acadian Shores (YAS) tourism operators cannot rely upon past trends and traditional markets to make informed decisions on current conditions and future opportunities. Operators require relevant, comprehensive and timely market intelligence to make informed decisions on adjusting marketing strategies and tactics.

7.2 The YAS Need

With the designation of the Yarmouth & Acadian Shores (YAS) as an official travel region the Department of Tourism, Culture and heritage will now be producing annual statistics on visitation to the region based on Statistics Canada data from the domestic and international visitors surveys. This will be a significant benefit for the region to

better understand and track visitor numbers, origins and other characteristics.

Yet operators' marketing intelligence needs extend well beyond the monthly and annual tourism statistics (compiled by the Nova Scotia Department of Tourism, Culture and Heritage, Statistics Canada or others), secondary data sources, and the four-year cycle of the Provincial Exit Surveys.

7.3 Recommendations

To complement market research and data provided by the province, it is recommended that the Tourism Division of SWSDA in association with regional tourism operators begin to collect and disseminate regular accountability research to assist in regional and individual business marketing decisions. This should include:

- Collection of regular visitor statistics from attractions, events and accommodation operators;
- Tourism development effectiveness monitoring for marketing, product development and industry infrastructure development; and
- Reporting back to the industry – Industry Market Intelligence Reports.

7.3.1 Collection of Regular Visitor Statistics

There is a critical need to begin working with YAS industry operators and the province to develop and implement a comprehensive visitor-tracking program to generate timely, relevant data for tourism planning and marketing decisions. The lack of useful data specific to the YAS region was a significant hurdle in developing this tourism strategy.

Any successful destination planning, product development, and/or marketing initiative needs market intelligence to:

- Create recognized benchmarks;
- Provide means to accurately compare performance;
- Capture valuable information about which tactics are effective;
- Aid in decision-making process when allocating budgets;
- Aid in decision making when developing campaigns;
- Identify “need areas” for product development, training, education; and
- Provide a platform to articulate tourism’s contribution and economic development

agency contribution to tourism stakeholders.³⁸

Individual operators throughout the region also benefit from market intelligence for the region to assist in their business planning and longer term strategic planning. The occupancy data currently collected by the Tourism Division of the SWSDA is a good start.

An ongoing program for collecting visitor statistics should use standard templates for:

- Accommodation operators including B&B’s; and
- Key attraction and event operators

Key characteristics of the program should include:

- Data collection templates that are simple and easy to use;
- Templates distributed and collected monthly during June, July, August, September and every other month thereafter; also during events with reporting immediately thereafter;
- Data collection from:
 - VICs: local, regional.
 - Accommodation properties including hotels, motels, Inns, B&B’s,

³⁸ Source - Mitchell and Westlake for Fednor, 2008

cottage/cabin resorts, resorts, university dorms used for visitors in summer

- Attractions: including Acadian Village, all museums
- Events – Canada Day; Tri county Multicultural Festival; Seafest; Dragon Boat Races; Sou’wester Intl Bike Rally; Yarmouth Shark Scramble; Systems Care Trivia Challenge; Coal Shed Waterfront Festival; Historical Reenactment Camp; Yarmouth International Air Show; Christmas Parade; Festival acadien de Clare; Musique de la Baie;
- Distribution of templates to accommodation operators on a disk or by email (the incentive for operators to participate will be the consolidated results report that is emailed back to all participants); email reminder to establishments to send info via email (or telephone info) at the end of each month;
- Collection of the following types of data:
 - Number of visitors/arrivals /overnight guests;
 - Guest origin (by approximate or accurate proportion) - use the following categories: Nova Scotia, New Brunswick,

Quebec, Ontario, Maine, Other states, overseas countries; and

- Average length of stay (approximate is fine).

7.3.2 Exit Survey

It is recommended that the Tourism Division design and implement an exit survey to assess visitor satisfaction and activities while in the region. This should be a one page (maximum) survey distributed as either:

- Option 1: On-line follow up with sample of visitors who have provided e-mails at various “check points” throughout the region (VICs, Attractions, Events – Accommodation operators, if desired); distribution frequency should be daily as e-mail addresses are received; or
- Option 2: Exit survey (hard copy) distributed in partnership with Bay Ferries (to passengers leaving Yarmouth en route to Bar Harbour and Portland) (captures US visitors); surveys distributed every two years throughout the summer (June-Sept); picked up weekly; reported monthly.

For whichever option is chosen, offer those who complete the survey a chance to win a worthwhile gift (“\$100 worth of Lobster” or “Weekend for two in YAS”); draw to be

completed and published on website in October (i.e. end of season).

Data collected through this type of survey should include:

- Demographics: Origin (capture name, address and e-mail) Age, party composition;
- Visitor Satisfaction: with accommodations, meals/cuisine, rate satisfaction levels (Likert scale 1-5) and list two trip highlights;
- Activity/Experience Participation: which attractions, activities/experiences participated (circle from a regional YAS list of key attractions, activities, festivals, events (n=10-15) and satisfaction levels with experiences participated in (Likert scale 1-5; 1=extremely dissatisfied; 5=extremely satisfied). List two trip highlights; and
- Other possible questions (space permitting): i. What brought you to YAS? ii. How did you hear about YAS? iii. How long did you stay in the Region? Iv. Overall impressions?

7.3.3 Measuring Tourism Development Effectiveness in YAS Region

Key sustainable tourism indicators must be developed for the broad region and

communities, in a broad range of categories, including the following:

Marketing

- Number visitors (Regional and local – from provincial and local sources);
- Expenditures; and
- Programs executed & results.

Products

- Strengthened/New Demand Generators (Attractions, experiences #, type) (yearly);
- Event impact measurement (ongoing; enlist student help – all major events); all events;
- Green space, river green etc. (Staging Area) Status;
- # New tourism experiences offered yearly;
- Artisans;
- Themed routes;
- Species list distribution; and
- Self guide itineraries.

Traveller Services

- Signage and programs completed;
- Entry Point/Gateway Development; and

- VIC and Full-Service Gas Station distribution → brochures etc.

Communities

- Number new tourism businesses established (or ceased business);
- Net job growth;
- Employment in the tourism industry;
- Number of training/certification programs participated in; and
- Improved streetscapes.

Partnerships

- Number of and type of partnerships;
- Number and type of partnership programs implemented;
- Packages & Experiences;
- # partnered existing and new packages created (Role: Destination Southwest Nova Scotia);
- # packages purchased (through centralized website or operator reporting); and
- Cost of packages/experience offering vs. ROI.

Print Media

All promotions should have a tracking number, coupon, call to action (i.e. require

an e-mail address) to track the effectiveness of promotion efforts.

Tracking depends on the goal of the piece:

- Advertising and Promotion Standard Objectives and Effectiveness measures: Destination awareness, advertising awareness, advertising content, impact of ads on travel intentions; and
- Inquiries/Fulfillment Standard Effectiveness Measures: number of brochures requests, number of consumer calls handled, number of coupons redeemed, number of people who registered at DMO website (or VIC) to obtain information.

Tradeshows

- Number of leads per trade show attended by Regional representative.

Website

- Able to capture basic information (name, address, e-mail?);
- Number of inquiries; and
- Google Analytics: tracks visitors to site, monitors and summarizes user patterns. ("Deep Web Traffic analysis is expensive and NOT necessary); ISPs provide basic tracking software and basic analytics at no extra cost. E.g.: number of user sessions, number of unique users,

number of repeat visits, click-throughs to other sites, number of specific web page view counts, number of click-throughs to member/sponsor sites from your site, ads or links, number of coupons redeemed, average length of session, search engine referrals.

Media/Public Relations

- Editorial placements (total number; domestic vs. international; broadcast vs. print).

7.3.4 Industry Market Intelligence Report

This is the consolidation of industry information noted and disseminated to operators 6 times yearly (minimum). Essentially a newsletter but positioned as a “must read”.

The publication should be compiled and distributed six times per year: June, July, August, September, November and April.

All tourism stakeholders in YAS should be on the distribution list (consolidated lists).

The information should be compiled, and summarized directly from the sources identified below. This approach puts all information into one document, relevant to all operators, providing a useful tool for their own business and strategic planning. Sources should include:

- Regional visitor statistics collected monthly from accommodation and attraction operators in a consolidated format;
- Useful provincial or State of Maine data or report summaries with a hotlink to download the report;
- Upcoming events, conferences, shows etc., and
- New tourism development initiatives in the region.

8. Strategic Initiative - Transportation Strategy

8.1 Context

There are currently three modes of transportation that travellers can use to reach Yarmouth & Acadian Shores (YAS) destination area:

- 100 series highways and secondary and scenic highways along the north and south coasts of Nova Scotia;
- Private commercial ferry service between Maine (Portland and Bar Harbour) and Yarmouth, from mid-June through mid-September; and
- Recently established private commercial scheduled air service into Yarmouth International Airport from Maine (Portland) and Halifax, twice daily, five days a week.

Highways

Highway access provides the greatest capacity (virtually unlimited) and represents the primary mode of transportation for visitors to Nova Scotia in general. Given the relatively remote location of YAS with respect to established visitor travel patterns within the province and intervening opportunities, highway access is

important but does provide any competitive advantage for the region.

Air Service

Capacity of the air service is approximately 6,200 passengers inbound annually – 3,100 each from Portland, Maine and Halifax. It provides YAS with a direct link to two important markets.

As the service has just begun (February 2009), it remains to be seen if capacity will expand or contract, or even if the service will prove to be viable over the long-term.

Ferry Service

The ferry service provides substantial capacity – approximately 84,000 passengers based on per trip capacity of 700 and the current 7 days/week arrival schedule -- but a short season of 4 months. Actual traffic on the ferry has been substantially below capacity over the past few years (and continues to decline), resulting in sizable financial operating losses that the province and the Federal government have underwritten.

According to management of the ferry service, the current schedule reflects their guests' preferences to overnight in Portland and Bar Harbour, due in part to a stronger

tourism offering. It is unlikely that return to a schedule that necessitates overnight stays in Yarmouth will occur in the short to medium term.

During the research conducted as part of this assignment many thoughts, concerns and possible solutions were raised with respect to the future ferry service into and out of Yarmouth.

For example there was discussion about new Fast Ships technology developed at MIT being used instead of the CAT, to operate year round and carry people, limited cargo, trucks, and buses. These ships could conceivably travel further down the coast to Portsmouth (where Interstates meet) or Gloucester (where there is a new terminal with nobody using it after failed Shelburne ferry attempt).

There has also been much discussion about the need and opportunity to offer both passenger service and cargo service out of Yarmouth. The idea of going back to more conventional cruise ship type ferry service

The Town is already working with consultants on the potential divestiture and redevelopment of the ferry terminal, currently in federal hands. All of these initiatives could help

The long-term option currently being pursued by the Town and SWSDA is to come

up with a creative financing approach (to help reduce the necessary load factor to break-even). It is hoped that if successful, this would enable Bay Ferries to purchase a second hand conventional monohull ship to begin offering year round service from Yarmouth to Portland in the summer months switching to Bar Harbour in the winter season.

There is a complementary effort underway to enable customs pre-clearance to Yarmouth. It is envisioned that this ferry service would also place more emphasis on facilities and programming for onboard entertainment including possibly a casino, rooms, and other forms of entertainment to create a more appealing ferry experience and generate significant new revenue streams for the ferry operations.

Clearly, the future of the ferry service is far from certain. It represents, nonetheless, a unique and powerful competitive advantage for YAS -- a high capacity direct link for travellers from the New England states.

8.2 The YAS Need & Opportunity

All three modes of transportation are essential parts of a vibrant YAS tourism economy.

The most critical piece of transportation infrastructure from the perspective of both

stabilizing and growing the tourism economy, however, is the ferry service from the north eastern U.S. The combination of capacity and direct access from New England states provides YAS with the opportunity to substantially grow the number of leisure travellers attracted to the region.

As a result, it is essential to the long-term growth of the YAS tourism economy that long-term, high capacity ferry service from New England is secured.

8.3 Recommendations

It is recommended that on behalf of, and with the active support of YAS tourism industry stakeholders, SWSDA support any all efforts of public and private sector transportation agencies and businesses to enhance transportation services into YAS. This includes:

- At a minimum securing, and ideally enhancing, long-term ferry service from New England;
- At a minimum securing the current scheduled air service into YAS from New England and Halifax, and ideally expanding capacity from both markets; and

- Upgrading both Highway 101 and 103 to twinned modern highway standards, connecting at Yarmouth.



9. Strategic Initiative - Next Level Catalyst

9.1 Context

From the outset of this assignment, YAS tourism industry stakeholders have articulated a desire for a “star generator” attraction within the region. They believe the region’s tourism economy needs a new tourism experience capable of attracting 50,000+ visitors annually to fully realize its potential.

The five strategic initiatives described above are intended to re-position Yarmouth & Acadian Shores as a Nova Scotia destination area of choice and to build a sustainable long-term tourism economy to pre-2005 levels of visitors and spending. We believe that implementation of those five initiatives will create the **necessary pre-conditions** for a “star generator” to have the desired effect in YAS. In this context, the “star generator” can be seen as a catalyst propelling tourism economy growth to the next level.

9.2 YAS Opportunity

When the objective is to attract a large number of visitors for a tourism experience, a location close to an existing large volume of visitors is ideal. Locating the experience

where the visitors are substantially reduces the marketing investment required to attract visitors.

In YAS, the ferry terminal in Yarmouth is the location with the highest number and concentration of visitors – currently in the range of 30,000 visitors annually disembarking. More importantly, there is potential for a much higher number of visitors at this location -- as much as 84,000 under the current ferry schedule, possibly more if a year round service can be implemented.

As a result, on the basis of location alone, the ferry terminal specifically, and the Yarmouth waterfront in general, represents an attractive opportunity for the development of a YAS “star generator”.

In addition:

- Portland and Bar Harbour Maine have demonstrated how development at and around the ferry terminal creates a compelling attraction for tourists. It is because ferry passengers prefer arriving at and spending time at these waterfronts that the ferry schedule was changed.
- The current Yarmouth ferry terminal and waterfront are very weak elements of the

YAS tourism infrastructure – at best they are an underwhelming experience for arriving ferry passengers, at worst an area that visitors wish to quickly exit or avoid. Given that Yarmouth is the largest urban area in YAS, its waterfront and adjacent downtown should be prime attractions.

- The YAS brand is seeking to position the region as a destination of experiences “shaped by the sea”. The Yarmouth waterfront has the potential to host an extensive number and variety of experiences shaped by the sea.
- The Town of Yarmouth is currently in the process of developing a waterfront master plan that includes acquisition of the ferry terminal from the Federal Government. Thus the timing is ideal to consider a “star generator” as part of the master plan.
- Many communities across Canada and the U.S. are embracing waterfront development as a catalyst for tourism growth, recognizing the appeal of these areas to a broad spectrum of visitors.

These factors led the consulting team to focus on the opportunities for a “star generator” experience presented by a redeveloped Yarmouth ferry terminal and

waterfront, with strong links to the Yarmouth downtown.

9.2.1 Creative Session Input

A creative session was held in Yarmouth on September 8th to explore the options for developing a “star generator” experience at the Yarmouth ferry terminal and waterfront.

The participants in the session came from both government and private sector and were invited to ensure a good cross section from different tourism sectors. The intent of the session was to solicit the creative input of participants in identifying experiences -- activities and programs -- that could take place near or around a redeveloped ferry terminal.

There were a number of key issues and opportunities that were raised during the session:

- The CAT brings many families across but there is little to do for families in Yarmouth.
- The fishery is generally inaccessible to tourists – is there some way to create and interactive fishery experience?
- There is an opportunity to celebrate Yarmouth’s 250th in 2 years.

- Develop the capacity for customs pre-clearance so the ferry itself can become the attraction.

Some of the suggested ideas involved new 'bricks and mortar' type investments as follows:

- Science centre;
 - Theme park on one of the offshore islands;
 - Canada's largest indoor water park;
 - Quality community theatre with 300+ seats;
 - Government to purchase or lease historic waterfront buildings and convert to museums, art galleries and shops;
 - Marine Discovery Centre;
 - Marine centre of Excellence – with virtual reality 'Storm Room' to enable visitors to experience Atlantic storms;
 - Develop an outdoor amphitheatre for summer performances;
 - Small multi-use convention centre;
 - Outdoor World – outdoor excursions promotions and booking centre; and
 - Cabriolet lift to Bunker's Island.
- Many marketing, packaging or programming suggestions were also tabled, including:
- Trading musicians across the border – create a 2 nation music extravaganza;
 - Bring in Zydeco bands from New Orleans;
 - Develop an outdoor theatre program like Trinity Pageant;
 - Position Yarmouth as the gateway to southern Nova Scotia – take packaging ownership of adjacent opportunities like whale watching in the Bay of Fundy by packaging and marketing, or Lobster Bays to capitalize on the strength of Shelburne's lobster fishery;
 - Enact the 'Unsightly Premises Act' to clean up the area around the ferry terminal;
 - Have the government declare the Main Street as a Duty free zone to encourage high value shopping experiences;
 - Develop some creative new special event concepts such as:
 - Pirate Days;
 - Summer Solstice event;
 - 250th Celebration;
 - Whale Watching Days to coincide with arrival of whales in the Bay of Fundy; and
 - Lobster Days to coincide with the opening of lobster season.

9.2.2 Learnings from Waterfront Development Elsewhere

Atlantic Canada

The efforts of smaller urban centres to revitalize their waterfront with the inclusion of travel generators is tied to broader strategies to renew downtowns in Atlantic Canada and beyond.

These efforts have evolved from the 1970s often based upon similar needs and the availability of funding support from senior government. Understanding the evolving role of downtown settings provides a context for the assessment of local travel generators.

Within Atlantic Canada, there is no standard approach to initiate and sustain a competitive and growing waterfront area with a focus on tourism. Rather, the process of planning, funding and implementing a plan to increase investment and development is dependent upon:

- Responding to a specific need; such as the closure of a long established employer, changing market forces that have resulted in economic growth or the availability of government funds.
- Local community interests and the municipality reaching an agreement on a desired plan of action.

- A commitment from participants to support the selected plan's implementation.

The interaction of local needs with market forces and government funding in other Atlantic Canada communities provides valuable insights on how to frame new strategies for the Yarmouth waterfront.

Historic waterfront urban areas are typically renewed and successfully repositioned in the marketplace by moving through four distinct stages: meeting basic needs, economic base adjustment, economic base growth and partnering.

Stage 1: Meeting Basic Needs - For many revitalized downtown waterfront areas in Atlantic Canada, the first stage of managed renewal occurred from late 1960s to the mid 1970s. During this period, the Federal Government, through the Ministry of State for Urban Affairs and other initiatives, was the major funding source for urban renewal programs to improve the condition of housing and infrastructure. The Neighbourhood Improvement Program (NIP) was one of these initiatives that assisted owners to upgrade their premises.

Stage 2: Economic Base Adjustment - By the mid 1970s, government funded urban renewal programs shifted away from resolving housing and public health issues

to address economic base decline. This shift ushered in the second stage as the rapid development of suburban-type shopping centres and business parks, and changing consumer tastes, resulted in many shoppers, investors and business operators abandoning downtowns and adjoining waterfronts. Two distinct approaches were followed to address these conditions. Provinces such as Nova Scotia and Saskatchewan set up “Mainstreet Programs” that provided cost-sharing on customer-focused improvements (consolidated off street parking, building façade upgrades, new sidewalks, etc.) if:

- A business improvement district boundary was defined;
- The local business community and residents agreed on a strategy;
- The local council approved the strategy; and
- A small tax levy was applied to local businesses to pay for a portion of the upgrading costs.

Implementation of the Mainstreet Program was typically coordinated by a committee of council, a downtown commission or a downtown corporation (often with expropriation powers). Lunenburg, Nova Scotia was a major beneficiary of the non-profit Main Street Program initiative.

Important architectural studies and surveys were conducted and, in part, led to the recognition of Old Town Lunenburg as a UNESCO World Heritage Site in 1995.

A different approach was followed in Ontario, Prince Edward Island and New Brunswick that focused more on downtown /waterfront anchor projects. The intent of this approach was to find a developer to build a major downtown anchor project to compete with increasingly popular suburban malls. Market Square in Saint John and the Confederation Court Mall in Charlottetown are examples.

In hindsight, the community economic development approach provided the broadest base of lasting social, economic and heritage/preservation benefits at an overall lower cost.

Stage 3: Economic Base Growth - With improved housing and a rejuvenated (or stabilized) retail base, many communities moved into the third stage that focused on the hiring of coordinators for community or downtown marketing and the programming of special events or attractions. A focus of these initiatives was the tourist market. These programs, especially in the Maritimes, focused on “bringing back the waterfront” for both residents and visitors. Many communities now have very busy

summertime waterfront programs each year.

Stage 4: Partnering – Today, many communities remain in the third stage. Others are pursuing new projects that are responding to more retail competition from big box retail outlets and increasingly relying upon partnerships with senior government, non-profit groups and the private sector. This stage has seen land use controls shift from minimum standards to quality standards (or guidelines) with a focus on mixed-use projects that often include housing on upper floors. The intent of these efforts is to bring life, vitality and economic strength back to downtown areas. This stage acknowledges that a low interest rate investment climate may require partnerships with government to make projects viable as a small initial investment means returns below levels experienced in the past when rates were higher and more leverage could be achieved. The Charlottetown Area Development Corporation (CADC) and the Halifax-Dartmouth Waterfront Development Corporation (WDCL) are examples of government organizations that have broad mandates for partnering to facilitate development.

Montague, PEI is an example. This project is managed by the Montague Waterfront

Development Corporation and the main features are a train station (restored and expanded by 1,800 square feet) that includes a visitor information centre, retail shops, as well as shower facilities for visitors to the marina.

A good example from a more rural setting that involves government partnerships is Fisherman's Cove. It is located about 20 kilometres from downtown Halifax in the Eastern Passage area of the Halifax Regional Municipality. This project was developed in the mid 1990s to provide an alternative economic base to a traditional fishing community that was negatively impacted by the closure of the Atlantic fishery. The essence of this project was the construction of numerous small rental buildings to resemble fishing shacks on the waterfront. None of the structures are old. The wharf and surrounding lands are leased by a non-profit community organization from the Province of Nova Scotia (Natural Resources) for 60 years (starting in 1995). Most tenants have one-year leases and most operate on a seasonal basis. There are 11 buildings plus a visitor information centre and small seminar facility at the site.

Funding was provided under the TAGS program for the restructuring of the fishery. All of the buildings are leased and no businesses opened from January to March.

A Community Board of Directors oversees Fisherman's Cove. The Board has seven members with elected officials included. All staff are volunteers as there is not enough lease income (estimated as \$100,000 per year) to hire professional staff. Approximately 75,000 people visited the site each year. Bus tours average 60 per year and there are six major festivals each year.

Summary of Best Practices

- Transform the waterfront as the gateway to the town or city.
 - Strengthen the community open space system by linking nearby parks and linear corridors.
 - Plan for a fine-grained mix of uses to create a vital development district.
 - Maximize waterfront views.
 - Build on the waterfront's unique qualities.
 - Focus on water dependent and water-related uses.
 - Design the waterfront and plan events to fit the changeable nature of the waterfront – design to incorporate space for public events and celebrations.
 - Celebrate the location's history.
- Develop to serve the people (visitors and locals), the water and the bottom line.

9.2.3 Market Demand

A ferry terminal/waterfront redevelopment will appeal to existing visitors traveling through the region, including those arriving by ferry, as well as auto or motor coach tourists arriving from other destinations such as Halifax. These visitors have already chosen Nova Scotia for all or part of their vacation experience, and the challenge for YAS is to be included for a greater share of the Nova Scotia itinerary.

This development would be targeted at three principal market segments:

- **Ferry passengers.** While the current schedule makes it more challenging to convince visitors to stay overnight, it is hoped that upgrades to the waterfront including a new ferry terminal would result in a schedule more conducive to overnight stays.
- **Other Touring visitors.** Overnight non-resident visitation to Nova Scotia was an estimated 2.1 million people in 2007. Resident visitors took an additional two million overnight trips last year. The majority (54%) of non-resident visitors came from Atlantic Canada, with most (63%) arriving by private car. A

significant share of non-resident visitors (31%) arrive by air³⁹.

- **Weekend get away market** – focused primarily on the 370,000 residents in the greater Halifax area,⁴⁰ this would provide an opportunity to diversify the region’s tourism base. However, it must be recognized that there are many intervening opportunities, and that it will be necessary to offer a unique and competitive visitor experience in order to lure travellers away from destinations such as Lunenburg or Mahone Bay.

9.3 Recommendation

The more individual attractions and demand generators that can be encompassed within the ferry terminal and Yarmouth waterfront redevelopment, the greater the opportunity to broaden its market appeal and increase both daytrip and overnight visitation. In addition, the more linkages and connections to the full range of YAS experiences that can be forged with the waterfront redevelopment the greater the opportunity to extend visitors’ length of stay as they are compelled to explore these connections.

³⁹ 2007 Report Card, Nova Scotia Tourism Partnership Council, 2008=7

⁴⁰ www.halifax.ca

Accordingly, it is recommended that the long-term redevelopment plan for the ferry terminal and Yarmouth waterfront should encompass the following core elements:

- New state of the art ferry terminal that provides a welcoming and positive first encounter for visitors arriving in Yarmouth – this is the anchor facility;
- Mooring facilities for small cruise ships (“pocket cruises”) and excursion tour boats;
- Water-based recreation facilities and opportunities – this could include a combination of outdoor (fishing, boating, sea kayaking, splash pad) and indoor (water park/swimming pool);
- Other recreation facilities and opportunities – this could include a waterfront boardwalk, bicycle and roller blade rental kiosks, and picnic areas;
- Culture and heritage-based entertainment facilities and opportunities – this could include indoor and/or outdoor performing arts space, indoor and/or outdoor festival and event space, indoor and/or outdoor demonstration space, visual art exhibit and studio space, and temporary artifact exhibit space;
- Indoor and outdoor food and beverage facilities – snack bars, restaurants, pubs;

- Meeting and conference facilities;
- Specialty retail and gift shop space; and
- Commercial accommodation.

To the extent that existing facilities in the waterfront and adjacent downtown can be encompassed by and/or physically linked to the redeveloped ferry terminal, some of the elements may be existing facilities that are enhanced, renovated and/or expanded to complement an overall high quality of development and consistency of design theme.

A development of this scale would require considerable public and private funding, with public investment required at the front end to develop some of the key traffic generators such as the new ferry terminal.



10. Investment Strategy

Although the Catalyst Project is a longer-term initiative for Yarmouth & Acadian Shores (YAS), it is beneficial to begin now to develop a coordinated tourism investment attraction program. In fact, the benefits of this go beyond just the catalyst project. Even well established tourism destinations look to continual reinvestment in tourism is because:

- Being recognized as an attractive and desirable tourism destination is a catalyst for economic and social development – leads to larger market, better accessibility, strong image, increased availability of qualified staff and enhanced quality of living.
- Tourism is a consumer good and, like all consumer goods, reinvention and repackaging is necessary to remain relevant and interesting to customers.
- The status quo in tourism is not an option – the industry and the product has to continue to evolve and develop.
- The implied goal of growing the number of visitors from Ontario will require additional capacity in lodging, attraction, recreation and related tourism infrastructure.
- Employment generation.
- Global competition has resulted in the creation of new or reinvention of dated tourism destinations, placing greater pressure on Nova Scotia to remain relevant and interesting to potential visitors.

Ultimately, reinvestment in tourism minimizes risk for existing investors and contributes to a more tourism-friendly environment. The following are key tourism trends that need to be taken into account when developing a tourism investment strategy.

Increasingly sophisticated travellers

As fast as the volume of international travel expands, demand for more sophisticated travel experiences is growing still faster. Experienced travellers are increasingly looking for higher quality, more unique experiences and services. This applies to all aspects of the travel experience from accommodation to attractions to transportation services.

Outbound travellers from emerging countries

The number of affluent potential travellers in countries such as China and India, as well

as select Eastern European, Gulf States, Australia, Korea and South American markets, are offering new opportunities and new challenges. These nascent markets will play an increasingly important role in international travel over the next two decades, due to the huge populations in some of these countries and growing affluence in others. Each market has its own unique product and service needs and expectations.

New tourism destinations/competition for both visitors and investment dollars

Rising economies and new outbound travellers have seen new tourism destinations created seemingly overnight. The best current example is the Middle East. In Dubai alone some 32,000 hotel rooms most within the 4 and 5 star category have been developed in the last few years with a further 80,000 new hotel rooms in the development pipeline over the next 5 years. By comparison, greater Toronto has about 33,000 hotel rooms. In the mid 1960's Dubai was a poor desert land – today it is one of the world's fastest growing tourism destinations.

Recreational real estate shared ownership products

New variations of shared ownership of recreational real estate such as fractional,

condo/strata hotels, private residence clubs, and non-equity clubs have joined the standard timeshare offerings. These products have had the effect of increasing the financial viability of mixed-use resorts (thereby creating opportunities for more destination commercial lodging) as well as the potential for limiting general leisure travel to alternate destinations.

Sustainable tourism and greening the industry

Climate change is one of the most important long-term issues facing the tourism industry as witnessed by the impact on tourism seasons (i.e. shorter snow seasons) and travellers buying behaviour (i.e. seeking more sustainable travel solutions and destinations). The demand for ecotourism or sustainable tourism opportunities is likely to continue to increase as will the impact of the rising cost of gas (and related emission taxes), undoubtedly changing travel patterns.

New products and experiences

The accommodation sector continues to further segment with such concepts as mega resorts, boutique hotels, shariah compliant hotels, ecolodges, all-suite hotels, limited-service and extended stay properties. The choice of accommodation broadens the market for the tourism experience by

meeting a wider range of traveller needs, preferences and price points. New attractions are being designed to provide greater participant control and encourage interplay between the visitor and his/her environment. Advances in technology have allowed attractions designers to realistically duplicate virtually any natural or special effects experience. A greater use of water related activities, attractions and landscaping is occurring in theme park design as well as in nearly all forms of real estate development. Design for all-weather operation/artificial environments - designed with a greater degree of weather protection in order to enable a longer operating season and longer operating hours per day. Future designs will incorporate indoor/outdoor combinations using new technology structures, domed enclosures and moveable walls. In the future they will play an increasing educational function to introduce, interpret, and educate visitors to the local environment and to the host community and its values.

Weak tourism performance/increased investor risk

A particularly dramatic trend occurring in the YAS region is the continuing decline in the tourism sector. Significant new investment will be contingent on a stabilized industry and secure access to both the NE

US and Nova Scotia (domestic and out of province) tourism markets.

Given these trends, the YAS region needs to ensure:

- An environment that encourages aggressive pursuit of new tourism investment to stay in tune with changing market needs and expectations, as the market mix and type of traveller evolves;
- Constant refreshment of the tourism offerings in the region to both expand market appeal and to continue to appeal to repeat markets;
- More creativity in attracting tourism investment;
- The right tools are in place to promote region's competitive advantages; and
- Effective and consistent destination marketing, and political commitment to tourism.

The status quo is not an option. Continued improvement and industry stabilization is required in the short term and in the longer term new investment and reinvestment will be required to grow the tourism sector.

Where Can YAS Influence Investment Attraction?

An investor and/or developer/operator of any business enterprise, regardless of size

or scale, will go through a relatively structured evaluation process when assessing a new development or expansion opportunity. Aspects of this evaluation process will be unique to a tourism enterprise but many others will be somewhat generic and, often, more a function of market, financial, economic, political and other factors. It is important to understand the process investor's go through in an effort to anticipate and become more proactive in seeking and soliciting investment.

Typically the path to a completed investment begins at the "Identification" or market opportunity stage progressing through an assessment stage (where the specifics of the investment opportunity are overlaid on relevant market factors), and culminating at the development and operation stage. Three stages of evaluation and implementation are summarized in Figure 16 (page 103).

Public-sector policies, legislation and attitude towards investment can affect the outcome of each evaluation stage. However, both the degree of public-sector intervention and the evaluation stage where such intervention is employed varies considerably among jurisdictions.

Examples of activities undertaken by government to support tourism investment are outlined in Figure 17 (page 104).

Figure 16: Considerations in the Typical Investment Opportunity Evaluation Process		
Identification	Assessment	Development & Operation
To determine if the destination/market meets minimum criteria for the business model	Conducting due diligence on the project feasibility given local conditions & requirements	Design, construction, pre-opening activities & start-up operations
General considerations		
Market area population & demographics Economic stability Political stability Availability of labour Operating costs Tax regime Support infrastructure Tourism specific Tourism policy/support Tourism infrastructure Destination marketing	Competition Clarity of public sector requirements Responsiveness of approval authorities Fairness of legislative regime Time requirements Access to/cost of financing Tourism infrastructure/tie ins with critical mass	Cost of land & construction Transportation linkages/access Project specific design issues Operating characteristics unique to individual businesses
<i>Source: Case study research conducted by the Tourism Company and HLT Advisory for the Ontario Ministry of Tourism, 2008</i>		

Figure 17: Public Sector Roles in Investment Attraction	
Preparation	Documentation of specific product investment needs at the local level Analysis & documentation of public sector tourism assets potentially available for private sector use or involvement Review, & amend as possible legislation affecting the creation & operation of tourism businesses
Identification stage - Solicitation	Development of contact database of high potential investors/developers with background information Preparation of lure material specific to the opportunities identified & to extent possible tailored to the investor's business case requirements Pro-active investment opportunity solicitation – call for expressions of interest Preparation of jurisdiction wide and geographic market-specific 'teaser' documentation addressing key elements in Identification stage
Assessment stage	Preparation of demographic & economic profiles for potential markets Preparation of 'how-to' manuals documenting basic regulatory requirements (eg. How to register a company) Expediting specific information requests including pre-approvals required for due diligence Providing a 'one window' approach to government agencies
Development & Operation stage	Development land on preferential financial terms Financial incentives such as loans, grants, wage subsidies, or payments tied to performance Concessions such as needed infrastructure development, support services & marketing Tax deferrals
Aftercare	Continuation of relationship to facilitate future investments and/or reinvestments
<i>Source: Case study research conducted by the Tourism Company and HLT Advisory for the Ontario Ministry of Tourism, 2008</i>	

Recommendations

- Begin to develop a database of potential developers for the catalyst project in both eastern Canada and in the NE US.
- Initiate an integration assessment to tie together the Marine Terminal and Downtown Core projects that are already underway with the Catalyst Project.
- In association with the Town, the Port Authority and the other relevant agencies investigate the options for development incentives in the downtown and waterfront areas i.e. Community Improvement Plan areas/zones, Duty Free zone, possible tax incentives or concessions etc..
- Assemble a working group to begin to streamline the development planning and approvals process for the waterfront tourism zone or area to facilitate more of a 'one window' approach for prospective developers.



Appendix A: YAS Visitor Estimation Methodology

Methodology for 2004 Visitor Estimate

1. A special data analysis of the 2004 provincial visitor exit survey was commissioned from Nova Scotia Tourism, Culture and Heritage. It provided an estimate of 45,500 parties travelling in Nova Scotia between June 24 and November 21, 2004 and stopping for at least 30 minutes at 1 (or more) of 3 locations within YAS – Church Point, Yarmouth and/or Pubnico. With total provincial non-resident parties of 568,863 for the same period in 2004, the YAS share would have been 8% (45,500/568,863).
2. The exit survey identified average party size of 2.2 persons. Applying this to the total number of non-resident visitors to Nova Scotia in 2004 (2,208,000), produces a total of 1,003,600 non-resident parties.
3. Applying the 8% market share of provincial travel for the June-November period to the entire 12-month period in 2004, yields an estimate of 80,300 non-resident parties for YAS over the 12 month period (1,003,600 x 8%).

4. Applying the average party size of 2.2 to the estimated total number of non-resident parties visiting YAS in 2004 produces an estimate of 176,600 visits or visitors (80,300 x 2.2).

Methodology for 2008 Visitor Estimate

5. In 2004, roofed accommodation room nights sold in YAS was approximately 90,100 or 3.5% of the provincial total (90,100/2,579,000). In 2008, roofed accommodation room nights sold in YAS was approximately 63,000 or 2.5% of the provincial total (63,000/2,53,000). This is a drop of approximately 30% in the YAS share of total provincial roofed accommodation room nights sold.
6. If we assume that the YAS drop in share of total provincial roofed accommodation room nights sold reflects the pattern of change in the YAS share of non-resident visits to YAS between 2004 and 2008, then the YAS share of total provincial non-resident visits in 2008 would be 5.6% (8% x (1-30%)).
7. By applying the estimated 5.6% YAS share of total provincial non-resident visits to the 2008 total of 1,960,000 visits, the estimate for YAS non-resident

visits is approximately 109,600
(1,960,000 x 5.6%).

8. In 2004, approximately 74,400 non-resident visitors entered YAS by ferry at Yarmouth. If the Exit Survey estimate of 176,600 non-resident visitors to YAS in 2004 is accurate, then approximately 42% of non-resident visitors to YAS in 2004 arrived by water (74,400/176,600) leaving 58% or 102,200 arriving by land. YAS arrivals by land in 2004 would have represented approximately 4.6% of all Nova Scotia non-resident visitors (102,200/2,208,000).
9. Approximately 38,200 non-resident visitors entered Nova Scotia by ferry at Yarmouth in 2007. Although entries by ferry for 2008 are not currently available, based on discussions with Bay Ferry management it is unlikely that the 2008 entries were higher than 2007. If in fact the 2008 non-resident entries were unchanged from 2007, then entries by ferry in 2008 were approximately 38,200.
10. If it can be assumed that the YAS share of all Nova Scotia non-resident visitors arriving by land in 2008 remained at approximately 4.6%, then the total number of YAS visitors arriving by land

would have been approximately 90,600
(1,960,000 x 4.6%).

11. By adding the estimated 2008 non-resident arrivals to YAS by ferry (38,200), and the estimated 2008 non-resident arrivals to YAS by land (90,600) an estimate of 128,800 total non-resident visitors to YAS is obtained.

Appendix B: YAS 2009 Event Schedule

Event Name	Location	Start Date	End Date
National Heritage Day	Musée acadien in West Pubnico	February 16, 2009	February 16, 2009
Mardi Gras (Fat Tuesday) Celebration	Seashore Restaurant, Meteghan, Municipality of Clare	February 21, 2009	February 21, 2009
Our history in stories - Francophonie Day	Musée acadien in West Pubnico	March 18, 2009	March 19, 2009
Kite Flying	Le Village historique acadien de la Nouvelle-Écosse	April 22, 2009	April 22, 2009
Rhubarb Festival	Le Village historique acadien de la Nouvelle-Écosse	June 4, 2009	June 4, 2009
Museum week-end	Musée acadien in West Pubnico	June 13, 2009	June 14, 2009
National Aboriginal Day	Musée acadien in West Pubnico	June 21, 2009	June 21, 2009
5th Tern Festival	West Pubnico	June 26, 2009	June 28, 2009
Canada Day at Le Musée	Musée acadien in West Pubnico	July 1, 2009	July 1, 2009
Canada Day at Le Village	Le Village historique acadien de la Nouvelle-Écosse	July 1, 2009	July 1, 2009
Canada Day at Smuggler's Cove	Smuggler's Cove Provincial Park, Meteghan, Municipality of Clare	July 1, 2009	July 1, 2009
Strawberry Festival	Knights of Columbus Hall, Comeauville, Municipality of Clare	July 5, 2009	July 5, 2009
Strawberry Festival	Le Village historique acadien de la Nouvelle-Écosse	July 9, 2009	July 9, 2009
Festival acadien international de Par-en-Bas	Acadian communities in the Municipality of Argyle	July 10, 2009	July 25, 2009
Triathlon	Le Village historique acadien de la Nouvelle-Écosse	July 11, 2009	July 11, 2009
Yarmouth Seafest	Yarmouth	July 15, 2009	July 26, 2009
Home Made Ice Cream and Music	Musée acadien in West Pubnico	July 16, 2009	July 16, 2009
Festival Joseph & Marie Dugas	Joseph et Marie Dugas Municipal Park, Belliveau Cove	July 19, 2009	July 19, 2009
Yarmouth Dragon Boat Festival 2009	Lake Milo boat Club, Yarmouth	19-Jul-09	19-Jul-09
Historical Guided Tour	Musée acadien in West Pubnico	July 20, 2009	July 20, 2009
4 th annual Quilt Expo & Sale	Musée acadien in West Pubnico	July 22, 2009	July 24, 2009
Acadian Open Summerspiel	Centre de Clare Curling Club, Meteghan, Municipality of Clare	July 23, 2009	July 26, 2009
Sou'Wester International Bike Rally	Yarmouth Town and Airport Facilities	July 24, 2009	July 26, 2009
Festival acadien de Clare	Municipality of Clare	July 25, 2009	August 15, 2009
Art Exhibit & Sale	Musée acadien in West Pubnico	August 3, 2009	August 28, 2009
Annual Sacred Heart Church Quilt Exhibit/Sale	Sacred Heart Church, Saulnierville, Municipality of Clare	August 4, 2009	August 7, 2009
Argyle Adeptic Festival	Glenwood, Argyles and Pubnico	August 4, 2009	August 9, 2009
Western Nova Scotia Exhibition	Yarmouth Mariner's Centre	04-Aug-09	08-Aug-09
Blueberry Festival	Le Village historique acadien de la Nouvelle-Écosse	August 6, 2009	August 6, 2009
Annual Clare Bluegrass Festival	Bill and Cecile's Festival Grounds, Saulnierville	August 7, 2009	August 9, 2009
Sacred Heart Church Parish Picnic	Sacred Heart Church, Saulnierville, Municipality of Clare	August 9, 2009	August 9, 2009
Yarmouth Shark Scramble	Yarmouth Waterfront	August 12, 2009	16-Aug
National Acadian Day	Le Village historique acadien de la Nouvelle-Écosse	August 15, 2009	August 15, 2009
National Acadian Day	Musée acadien in West Pubnico	August 15, 2009	August 15, 2009
National Acadian Day	Municipality of Clare	August 15, 2009	August 15, 2009
Wedgeport Tuna Museum	57 Tuna Wharf Road, Lower Wedgeport	August 17, 2009	August 22, 2009
Cole Shed Music Festival	Yarmouth	August 26, 2009	August 30, 2009
La Baie Show and Shine Car Show	Club social de Clare, Little Brook, Municipality of Clare	August 30, 2009	August 30, 2009
Nova Scotia International Air-Show	Yarmouth, Nova Scotia	September 12, 2009	September 13, 2009
Chocolate Paradise	Le Village historique acadien de la Nouvelle-Écosse	September 16, 2009	September 16, 2009
Lights Along the Shore	Throughout Southwest Nova Scotia	September 18, 2009	September 20, 2009
Craft Splash	Yarmouth and Acadian Shores – over 40 venues across the area	September 26, 2009	October 3, 2009
Festival de la Parole	Municipality of Clare	September 28, 2009	October 4, 2009
Harvest Festival	Le Village historique acadien de la Nouvelle-Écosse	October 8, 2009	October 8, 2009
Haunted Village	Le Village historique acadien de la Nouvelle-Écosse	October 23, 2009	October 24, 2009
Dumping Day at Cape Forchu	Cape Forchu Lightstation, Yarmouth	November 30, 2009	30-Nov
Christmas Carol Concert	Musée acadien in West Pubnico	December 13, 2009	December 13, 2009

Source: SWSDA Tourism Division, 2009

