

cumberland region

Tourism Development Strategy
2019-2022

DRAFT



Tourism Nova Scotia- Fox Harb'r Resort, Northumberland Shore Photographer: James Ingram

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Executive Summary

Tourism is key to the economic health of the region and is a platform for building long term economic growth. The region accounted for 2% of provincial tourism-related revenues in 2017 which translates to \$194,000,000. The intent of the strategy is to take a more strategic approach to the growth and development of tourism in the region that is partner-based and designed to enhance the competitiveness of the Cumberland region as a visitor destination, to grow visitation, meet visitor expectations, and generate economic and social benefits for communities within the region.

The strategic vision for tourism in the region is, “to be recognized as a four-season tourism destination through facilitating the development, enhancement, preservation and collective marketing of our natural, historic and cultural assets, leading to an improved economy and quality of life.”

In the Cumberland region we are aligning with Tourism Nova Scotia’s strategic plan to do our part in helping reach the provincial goal set out in the “Now or Never an Urgent Call to Action for Nova Scotians” report by the Ivany Commission, which is to reach \$4 billion in tourism revenues annually by 2024. Our goal is to increase the visitors length of stay in the region by two days resulting in the average length of stay by “pleasure visitors” to 8.3 days and increase tourism revenues by 1% by 2024 which will result in an additional \$27 million in revenues entering the local economy.

The following strategic pillars identified by the committee will guide the implementation, and increase our efforts towards reaching the goal-

- 1) Collaborative tourism leadership structure
- 2) Branding and marketing
- 3) Sustainable tourism asset development
- 4) Communication, engagement, and outreach
- 5) Extend shoulder season & develop winter

This strategy sets out the strategic direction for the tourism industry in the Cumberland region for the next three years. The strategy was developed jointly between the three municipal units in the Cumberland region and supports the 2014 Community Economic Development Strategy and aligns with Tourism Nova Scotias 2018-2022 strategy, Driving Export Revenue.

Message From The Tourism Strategic Planning Committee

Recognizing the opportunity to develop tourism in the Cumberland region, a steering committee was formed to develop a strategy with the objective being to, “maximize the value of tourism in the Cumberland region.”

Together we researched, brainstormed and held community engagement sessions. Through a series of community consultations, tourism representatives, municipalities, and community residents shared their thoughts on how to develop tourism in the region and one constant message was, “working together”. This transparent process ensured that the feedback we received informed the results of our work and that the strategy is accountable to the people in the Cumberland region.

Tourism provides the region with sustainable, diversified growth that balances economic development with environmental, community and cultural values. We are in the early developmental phase of tourism planning and see the real potential in growing tourism in the region. It makes sense to align our efforts and work together to create a new vision for the future of tourism in Cumberland. Working together, we embrace sustainability, and diversity and align ourselves with Tourism Nova Scotia who are leaders in research and in identifying new opportunities.

The vision is not to encourage mass tourism and increase visitation at all cost. Instead, we will aim to attract a high-yield visitor and provide visitors with reasons to stay longer and spend more. Finding the perfect balance between encouraging tourism development and supporting economic growth, while also enjoying and protecting our natural environment are vital to the success of the strategy and sustainable tourism. Celebrating our art, authentic cultures, heritage, internationally significant geology and unique identity and pride of place are important. The SWOT analysis will be our guide and we will refer to it as we work to develop and grow tourism.

Together, we are working to share and celebrate the region’s rich and diverse heritage in a meaningful and authentic way. Building strong, healthy communities is at the heart of our work, while ensuring the benefits of tourism exist to include any community that wishes to pursue tourism development. Inclusivity is the cornerstone of our shared journey forward, because none of us can succeed alone. Now is the time to encourage and welcome all stakeholders to join us. By joining together, we can lead the way forward with a new vision for sustainable tourism. Our path ahead acknowledges the challenges, but more importantly, the promise of a strengthened tourism industry. Working together will help achieve the vision for tourism in the region.

The Cumberland Tourism Development Strategy Steering Committee

The Tourism Strategic Planning Committee



The Tourism Strategic Planning Committee Chair– Town of Amherst Councillor Darrell Jones

The Tourism Strategic Planning Committee Chairperson Vice Chair - Gregor Wilson– Ski Wentworth

Town of Oxford - Deputy Mayor– Rick Draper

Town of Amherst - Deputy Mayor- Sheila Christie

Municipality of Cumberland - District 10 Councillor– Don Fletcher

Municipality of Cumberland - District 5 Councillor - Lynne Welton

Town of Amherst - Business Development Officer - Rebecca Taylor

Municipality of Cumberland - Administrative Assistant to Community Development– Melanie Prendergast

Municipality of Cumberland - Tourism Development Officer - Stephanie Moreau

Joggins Fossil Institute- Director of Operations - Jordan LeBlanc

Fundy Geological Museum- Co-ordinator of Public Programs– Pat Welton

The Bicycle Specialist– Owner/Operator– Basil Hicks

Anne Murray Centre- Executive Director– Wanita Shay

Fox Harb'r Resort– President– Kevin Toth

Nova Scotia Indigenous Tourism Enterprise Network– Board Member- Joe Michaels

Tourism Nova Scotia- Tourism Development Advisor - Nick Fry





Tourism Nova Scotia -The Three Sisters, Eatonville Photographer: Scott Munn

Guiding Principles

The following guiding principles were embraced throughout the strategy development:

- 1) Research drives product development which drives marketing.
- 2) The strategy aligns with Tourism Nova Scotia's 2018-2023 strategic plan– Driving Export Revenue.
- 3) The strategy is enabled by and activated through partnerships, and the maximization of all available resources. Only through the cooperation of all parties (including local communities), will the strategy succeed.
- 4) Visitors are generally attracted to compelling destinations, icons, attractions, etc. and do not recognize administrative boundaries.



Introduction

This strategy sets out the strategic direction for the tourism growth in the Cumberland Region. It has been developed to increase visitation to the region and support community economic development. The strategy also supports Goal #14 of the Now or Never an Urgent Call to Action for Nova Scotians report; Tourism Expansion. This goal states that “as Nova Scotia’s leading source of service sector exports, gross business revenues from tourism will reach \$4 billion by 2024.” The strategy also supports Tourism Nova Scotia’s strategic plan and is created in alignment with the provincial tourism goals. We aim to increase overall revenues to 3% by 2024 resulting in an additional \$27 million in tourism revenues entering the region.

The Importance of tourism to the Cumberland region

Tourism is something the entire region can and should get behind. Developing tourism assets throughout the region will help create vibrant communities, generate increased revenues for existing businesses to support growth and create conditions that support opportunities for new innovative business development. Tourism is an important component to supporting a healthy, sustainable, diverse, thriving local economy.

After four consecutive years of non-resident visitation growth and a record-breaking 2017, it is estimated that tourism is a \$2.7 billion industry in Nova Scotia. According to Nova Scotia’s Department of Finance and Treasury Board, that equates to \$158 million in provincial government revenue that can be reinvested in programs that Nova Scotians depend on, like health care and education. It is also estimated that the industry creates more than 39,000 jobs in rural and urban communities across Nova Scotia.

In 2017, the Cumberland Region accounted for 2% of overall tourism revenues for Nova Scotia. Tourism operators and small businesses throughout the region benefit greatly from visitor expenditures, and the local economy will experience a spin-off effect of new money entering communities throughout the region.

In addition to the economic benefits, tourism provides an opportunity to explore and increase knowledge of local assets, share the region’s, distinctive natural and cultural assets with visitors and strengthen the economic and social value of these assets. The development of our cultural richness within the region - particularly of Indigenous peoples, Acadian and African Nova Scotian ancestry will also strengthen the Region’s ability to enhance the visitor experience while providing the opportunity to improve the quality of life and well-being of local residents.

Planning for Sustainable Tourism Growth – Planning For Generations

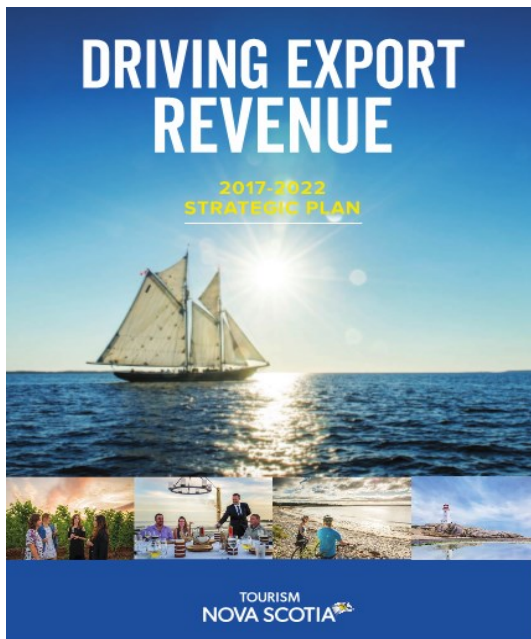
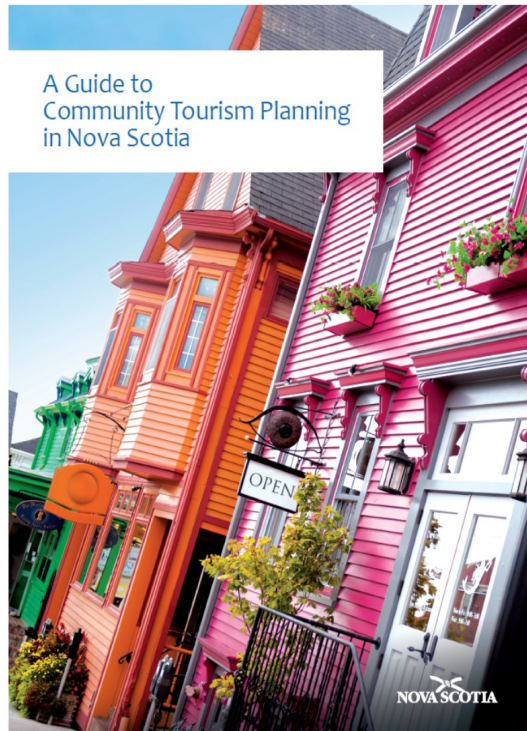
Understanding the value of tourism to the Cumberland region requires a clear map for all stakeholders– the three municipal organization’s (Cumberland, Amherst and Oxford) tourism operators, community organizations, and all other businesses who contribute to the visitor experience. By creating a shared vision, common goals and objectives we can create an experience for the visitor that contributes to strategic growth.

Through this collaborative approach to tourism development, we have a greater opportunity to experience long-term success and increase in visitation to the region. Collectively we will highlight the strengths of the region through the development of a common brand, collective promotion and marketing the region and work with stakeholders on product development.

The strategy outlines a consensus based vision, developed by the tourism strategic planning committee, stakeholders and representatives from the Cumberland Region and takes a visitor-centric approach to tourism planning. The strategy builds on current strengths while simultaneously identifying opportunities and performance targets to encourage growth.

The implementation of this strategy is not the responsibility of one organization, but is based on the recognition and understanding that we are all in the tourism business and all play a role in enhancing the visitor experience.





The Process of Developing The Tourism Strategy

- Followed the process set out in the document - “A Guide To Community Tourism Planning”
- Tourism committee began meeting in May 2018
- Extensive research and creation of a full tourism asset inventory of the Cumberland region.
- Alignment 2018-2023 Provincial Tourism Strategy “Driving Export Revenue”
- Familiarization with Nova Scotia’s Culture Action Plan
- Review of Federal Tourism Vision– Innovation, Science and Economic Development Canada
- Review of comparable destination’s strategies
- Review of Tourism Nova Scotia’s priority target markets
- Review and familiarization of EQ (Explorer Quotient) Profiles
- Understanding of EQ profiles contributed to strategic decision making specifically in regards to identifying our strengths, weaknesses and opportunities.
- Presentations to the committee Tourism Nova Scotia provided insights into visitor statistics related to the Cumberland Region and the province.
- Attendance of conferences and workshops regarding tourism trends, experiential tourism.
- 5 stakeholder engagement sessions were held throughout the Region with the purpose of conducting SWOT (strengths, weaknesses, opportunities and threats) analysis to be used to aid the tourism committee in the decision making of strategic goals and objectives.
- Ongoing workshops and brainstorming sessions, and discussions by the committee



Tourism Nova Scotia - Isle Haute Photographer: Patrick Rojo

Situation Analysis

Assessing the existing situation was a crucial first step, and one of the more time-consuming tasks involved in preparing the strategy but you can't plan for the future without having a solid understanding of the past and the present.

The outcomes involved in the situation analysis provided the committee a full understanding of:

- The value of tourism to the region
- The role of tourism from a national and provincial context
- Who is visiting and what experiences they are looking for?
- Factors and trends influencing tourism in the Cumberland region.
- What the assets are, including the demand generators, supporters and hidden gems
- Who is our ideal visitor?
- SWOT (strengths, weaknesses, opportunities and threats) analysis.



Situation Analysis

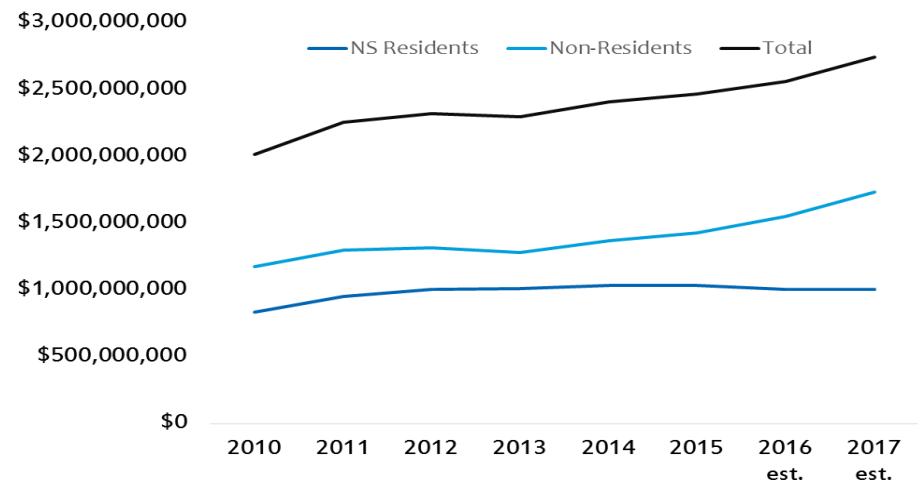
Tourism is a social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes. These people are called visitors (residents or non-residents) and tourism has to do with their activities, some of which imply tourism expenditure.

TOURISM REVENUES

Revenue Categories

- Accommodations.
- Food and beverage.
- Transportation.
- Travel agency and other reservations services.
- Cultural services.
- Recreation and entertainment.
- Other travel-related purchases.

Annual Tourism Revenue Results



The United Nations World Tourism Organization (UNWTO) identifies tourism as “...one of the fastest growing economic sectors in the world.” According to the UNWTO, tourism accounts for 10% of global gross domestic product (GDP), and for many developing countries, tourism is the most important sector. In 2016, global tourism increased by 3.9% and accounted for \$1.4 trillion USD in revenues.

National Context

Tourism is one of Canada's largest economic drivers. Canadians may be surprised to learn that tourism is one of the nation's largest economic sectors, generating total revenues in the order of \$98 billion annually, and accounting for 2% of Canada's GDP. The sector contributed an estimated \$27 billion in tax revenues across all levels of government in 2017. It is also one of Canada's most geographically diversified sectors, with a significant presence in all of Canada's provinces and territories.

Tourism is a rich source of jobs for Canadians. With a presence from coast to coast to coast, nearly 1 in 10 jobs in Canada is tied to tourism. Many jobs in the sector are skill-intensive, high-paying jobs, including management roles at hotels and airlines, data analysts, organizational travel managers, and meeting and event planners. These jobs exist across a range of industries such as food and beverage services, accommodation, transportation, recreation and entertainment, and travel services. Most tourism jobs are also resistant to automation, requiring a high degree of human involvement for the foreseeable future. The sector offers ample entry-level opportunities for young people looking to start their careers. For new immigrants, employment in tourism can be a pathway to integrating into the Canadian workplace.

Tourism also offers significant entrepreneurial opportunities. Small and medium-sized enterprises make up 99% of the companies in Canada's tourism sector. There are further opportunities to grow tourism businesses in many communities across the country, including urban centres and rural areas, considering that there are relatively few barriers to entry. Tourism is a particularly noteworthy opportunity for Indigenous-owned enterprises, as international travelers are seeking authentic, unique tourism products tied to the land and its peoples.

Provincial Context

Tourism plays a major role in Nova Scotia's economy. Nova Scotia's tourism industry had its best year in history in 2017 and its fourth consecutive year of growth. In all, a record 2.4 million visitors came to the province in 2017 and tourism revenue is estimated at \$2.7 billion.

For comparison, 2017 saw about 195,000 more visitors than 2016 – an increase of nine per cent. Tourism revenue increased by over \$100 million – seven per cent more than the year before.

2017 highlights include:

- highest visitation growth came from Ontario, up 16 per cent, or 84,000 more visitors, compared to 2016
- visitation from Western Canada was up 19 per cent, or 32,000 more visitors
- visitation by air, which on average brings higher-spending travelers, rose by 13 per cent
- visitation by road increased seven per cent
- licensed room nights sold in 2017 increased by two per cent to 2.8 million.

Tourism Nova Scotia continues to reach toward the Ivany Report “Stretch” goal to reach \$4B by 2024. The strategic pillars for the provincial crown corporation are:

- Invest in markets of highest return.
- Target higher-spending travelers in key geographic markets who are motivated to experience what Nova Scotia offers.
- Focus on world class experiences. Collaborate with private sector businesses, governments, and communities to develop compelling tourism experiences that will make people want to visit Nova Scotia.
- Attract first-time visitors to the province. These visitors are most likely to be influenced by marketing activities and if successful, chances are they'll be back again and
- Build tourism confidence by helping Nova Scotians understand what visitors are looking for in a vacation experience; while coaching and guiding partners to develop the kinds of experiences that will motivate travel and spur new tourism investment in the province. Confidence is a catalyst for growth.

Situation Analysis

Cumberland Region Context

In 2017, it was reported by Tourism Nova Scotia that the Cumberland region accounts for 2% of overall tourism revenues within the province. It was also reported that 56% of non-resident overnight visitors to the region were “pleasure” visitors which is 11% higher than the provincial average. (Appendix I)

Outdoor Activities – Pleasure Visitors

The top outdoor activities that pleasure visitors look to experience are the following; coastal sightseeing– 62%, visiting a beach– 59%, hiking– 45%, nature observing– 41%, viewing the worlds’ highest tides– 35%, whale watching– 11%, cycling or biking– 9%. (Appendix II)

Based on our assets, as a region, we are very well suited to be able to offer the pleasure visitor most all of the experiences they are looking for.

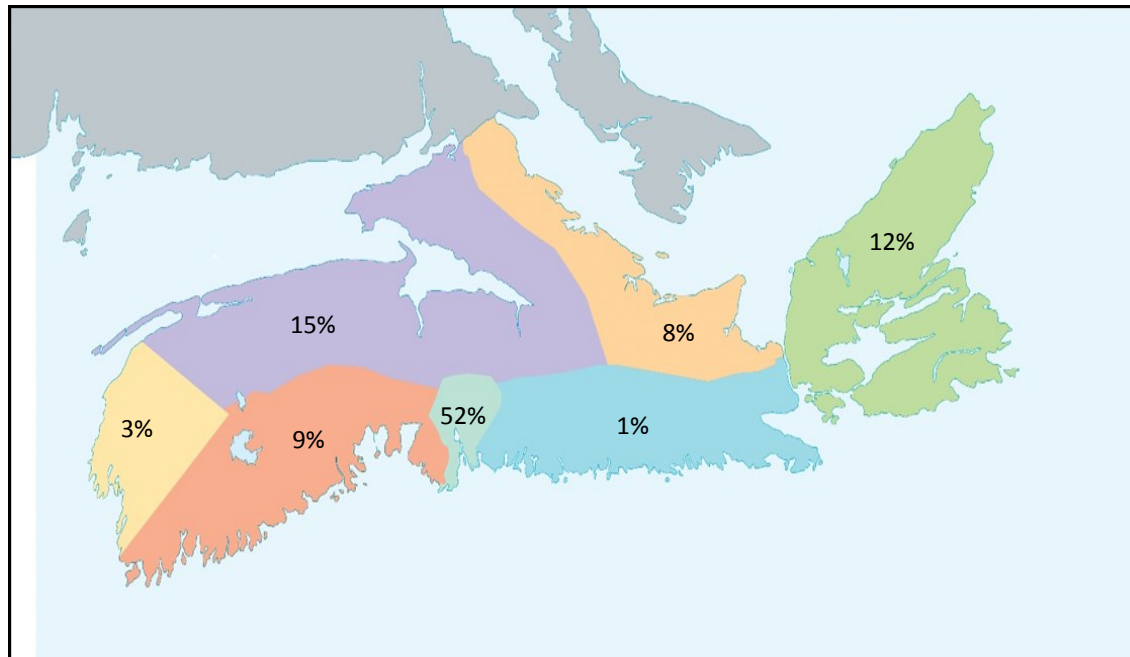


Tourism Nova Scotia— Advocate Harbour Photographer: Patrick Rojo

Situation Analysis

Percentage of visitor parties by origin to the Cumberland region is as follows: Atlantic Canada– 38%, Quebec– 7%, Ontario– 26%, Western Canada– 13%, New England 4%, Middle Atlantic 2%, Other US 6%, and Overseas– 5%. (Appendix III) The average party size visiting the Cumberland region is 2.4 people. (Appendix IV) The average length of stay by visitor parties within the Cumberland region is 6.1 nights which is over that provincial average by 1 night. (Appendix VI) The majority, 43% reported as staying in a hotel, 38% reported staying with family or friends, and 32% reported as staying at “other fixed roof” (Appendix VII)

The overall expenditure per party in the Cumberland region was \$1,850 which is above the provincial average of \$1450. (These figures excluded major purchases.) (Appendix VIII)



Cumberland County accounts for 2% of overall tourism revenues for Nova Scotia.

It is important to consider where visitors come from, and how they get to Nova Scotia, it has a direct impact on revenues.

Atlantic Canada is Nova Scotia's biggest visitor market. However, Atlantic Canadian visitors are among the lowest spending and least likely to be influenced by Tourism Nova Scotia's advertising efforts.

Factors and Trends Influencing Tourism in the Cumberland Region.

While tourism continues to be one of the fastest growing economic sectors in the world and growth is anticipated to remain at over 3% per annum through to 2030, there is a variety of factors and trends that influence the growth of the industry and the attractiveness of destinations.

Tracking and monitoring industry trends will be a focus and will be reported to the tourism steering committee for the purpose of partnering to providing training and educational opportunities via workshops for tourism operators so they are better able to adapt and make changes to their businesses to reflect these trends in order to meet or exceed visitor expectations and address potential challenges. Some of the challenges include the aging population, migration, technology and experiential tourism.

Aging Population

The population of the Cumberland region is aging. In 2015, youth under the age of 14 comprised 13% of the population, down from 17% in 2001. Seniors (residents 65+) comprised 25% of the population in 2015, while in 2001, they comprised 18%. The percentage of seniors is higher in Cumberland than both the provincial (19%) and national (16%) averages.

Migration

Between 2001 and 2015, despite a growth from international immigration, there has been a significant overall decline in population of 3,123 people. This is due to an aging population and migration of Cumberland residents to other parts of the country and province.

Technology

This is an area of change that is having wide spread impact on the tourism industry in terms of the visitors “path to purchase”, it’s ability to enhance the destination experience, and its role in the activities of tourism businesses and destination marketing organizations. To be competitive there is a need to leverage the use of technology in the creation of compelling experiences and in the management and marketing of the region. Today, nobody doubts technology’s importance in tourism and how it has influenced and continues to shape, the way we travel: from the vacation destination we choose, all the way to what we do once we're there and even in the time after we've come back from our adventure. It is so prevalent, that according to a Google Travel study, 74% of travelers plan their trips on the Internet, while only 13% still use travel agencies to prepare them.

Situation Analysis

Experiential Tourism

Today's visitors are seeking deep, authentic and memorable experiences that allow them to connect emotionally with a destination and to interact with its residents. This requires a traveler-centric approach that looks at the region's assets within the context of the benefits to our identified priority travel markets, combined with their attitudes, values, motivation for travel and their demographic profile. A 'pretty, friendly destination' doesn't cut it anymore. Travelers want to visit places that can offer them something different than they can find elsewhere, something that appeals to their interests and passion, something that can captivate, entertain, educate and provide lasting memories. These experiences, and their scope, intensity, uniqueness and appeal will contribute strongly to the decision by travelers to visit and spend time and money.

In addition to the above, there will be ongoing research regarding current and emerging trends that could impact the region. Some of these trends include; growth in short term rentals, rise of female and solo travelers, and conscious travelers (According to Booking.com, 2019 will see more conscious visitors roam the world as 49% feel social issues in possible travel destinations are of real importance when choosing where to go and 58% choose not to go to a destination if they feel it negatively impacts the people who live there).



Tourism Nova Scotia— Advocate Harbour Photographer: Patrick Rojo

Understanding Your Visitor

Explorer Quotient®, also known as EQ, was developed by Destination Canada (the Canadian Tourism Association) in partnership with Environics Research Group. EQ is a proprietary market segmentation system based on the science of psychographics. Rather than marketing to or developing products for travelers based on traditional segments, such as demographics (e.g. age, gender, income, etc.) and/or geography, EQ emphasizes the importance of traveler segmentation based on their psychological characteristics, such as their attitudes, beliefs, values, motivations, and behaviors. When various psychological characteristics are combined, different types of travelers emerge. These are known as Explorer Types.

There are nine EQ explorer types:

- Free Spirits
- Cultural Explorer
- Authentic Experienter
- Personal History Buff
- Rejuvenator
- Gentle Explorer
- No Hassle Traveller
- Virtual Traveller



The **Tourism Strategic Planning Committee** with their deep knowledge of Cumberland region's tourism assets; products, services and experiences, agreed that the region was well-positioned and best suited to attract and host the following three priority EQ market segments;
Cultural Explorers, Authentic Experiencers and Free Spirits.

Cultural Explorers

Cultural Explorers seek constant opportunities to embrace, discover, and immerse themselves in the entire experience of the culture, people and settings of the places you visit. Not content to just visit historic sites and watch from the sidelines, they want to participate in the modern-day culture as well. They often attempt to converse with locals, attend local festivals, or go off the beaten path to discover how people truly live.



- They are:
- positive
 - open-minded
 - curious
 - risk-taker
 - flexible
 - easy-going

Most likely to be seen at: heritage sites, cultural events, museums, festivals, B&Bs, hostels

Travel values

- companion experiences – prefer traveling with like-minded people
- living history/culture – enjoy ancient history and modern culture
- learning travel – seek to learn everything about a place, time, or culture
- constant exploration – always plan for the next outing

Free Spirits

Something of a thrill-seeking hedonist, travel satisfies their insatiable need for the exciting and the exotic. They like the best of everything and want to be surrounded by others who feel the same way. They have a lot of energy and want to see and do everything. It all adds to the fun! Young, or young-at-heart, they travel for the thrill and emotional charge of doing things. They just can't stay at home. Why would they?!



They are:

- open-minded
- ambitious
- enthusiastic
- fun-loving
- adventurous
- curious
- social

Most likely to be seen at: luxury hotel, tourism hot spot, top restaurant, night club, group tours

Travel values

- sample travel – like to see and experience a bit of everything
- constant exploration – always plan for the next trip
- companion experiences – prefer traveling with like-minded people
- indulgence – seek the best you can afford

Authentic Experiencers

In the world of explorers are Authentic Experiencers. With a foot in both worlds, they appreciate the understated beauty of natural and cultural environments. They enjoy using all of their senses when they explore and really get to know the places they visit. They quickly adapt to personal challenges and risks, easily figuring out how to make the most of every situation. They want to be fully immersed in their travel experience and tend to stay away from group tours and rigid plans.



- They are:
- spontaneous
 - discrete
 - ethical
 - eco-conscious
 - independent
 - open-minded
 - curious

Most likely to be seen at: nature reserves, world heritage sites, hiking trails, museums, home-stays, campsites

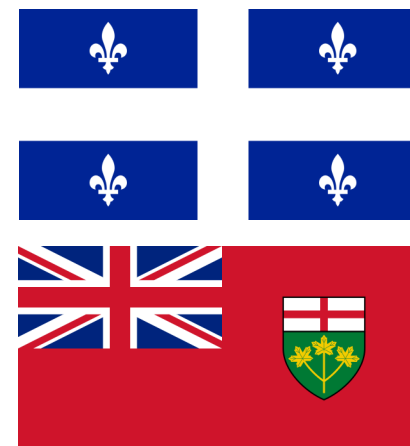
Travel values

- learning travel – like to learn everything about a place, time, or culture
- nature – enjoy vast natural settings and wonders
- cultural immersion – prefer integrating into the local culture
- personal development – seek self-improvement through understanding others

Key Markets

In addition to targeting the three priority EQ market segments; Cultural Explorers, Authentic Experiencers and Free Spirits, we will focus our marketing efforts towards reaching a national audience in the following key markets:

- Atlantic Canada
- Ontario
- Quebec



Tourism Nova Scotia is successfully attracting international visitors from the following key markets:

- Northeastern United States
- Germany
- China
- United Kingdom



We will partner with Tourism Nova Scotia and the Tourism Industry Association of Nova Scotia with the goal of sharing relevant information and research via training and workshops for tourism operators in order to be better prepared in meeting the needs of our international visitors to increase international visitation to the region and drive repeat visitation.

Experience the Cumberland Region



Tourism Nova Scotia Jost Vineyard

Demand Generators

Experiences, attractions, events and activities can, on their own, motivate a stop or a visit for some market segments. These are demand generators or travel motivators.

Based on the tourism strategic planning committee's work and research regarding the Cumberland region's tourism assets, industry trends, stakeholder engagement sessions, and understanding our three priority travel types, (the Authentic Experienter, the Cultural Explorer and the Free Spirit) six categories were identified as areas of focus regarding tourism products and experiences that have the greatest potential to drive demand and increase visitation.

These six categories as selected by the committee are:

- Regional culinary products and experiences
- Outdoor adventure
- Scenic trails and nature viewing
- Festivals and events
- "World class" experiences and products
- Local arts, culture and heritage

Top 5 Demand Generator For Each Travel Type



Following several meetings covering identifying and discussing the regions demand the tourism strategic planning committee narrowed down the lists further by voting on their top five demand generators for each travel type as shown below.

Top 5 Demand Generators For Each Travel Type as Identified by the Committee:

Cultural Explorer

- Landscape & Unique Geology
- Fundy Geological Museum
- Bay of Fundy– Worlds Highest Tides
- Nova Scotia Fiber Arts Festival
- Plein Air Festival

Authentic Experienter

- Cape d’Or
- Two unique shorelines
- NS Gem & Mineral Show
- Joggins Fossil Institute
- Fall Festival of Colors - Ski Wentworth

Free Spirit

- Cape d’Or
- Wild Caraway
- Fox Harb’r
- Jost Vineyards
- “Tidal Reveal”-Dig for Canada’s Oldest Dinosaurs– Fundy Geological Museum

Demand Supporters

Other experiences and things to do may not be the main motivator for visiting but contribute to the overall appeal of the destination. Visitors can add these other experiences to their agenda while they are there, helping to extend stays and increase spending.

Some of Cumberland Region's demand supporters identified by the committee include:

- Ship's Company Theatre
- Regional food
- Oxford "Wild Blueberry Capital of Canada"
- Golf courses
- Cape Chignecto
- Museums- Age of Sail Heritage Museum, Springhill Miners' Museum
- Dayle's Grand Market
- Birkinshaw's Tea Room & Coffee House

To be successful, a destination needs to have a 'critical mass' of demand generator/travel motivator and demand supporter experiences in place to make it worth a visit or a stop (along with basic services and amenities).



Wild Blueberry Festival in Oxford with the Kilted Chef



Town of Amherst Summer Night Market

Other Important and Unique Experiences

As a final step, the committee looked at about what else the Region has to offer that might have potential to help you develop tourism. These assets may be something ordinary or out-of-the-ordinary that could become a tourism experience. For this session, the committee broke into two groups and brainstormed hidden gems in the Region and the results of this session are as follows:

- Old Growth Forests (Oxford, Wentworth, Chignecto Park),
- Special beaches (Chignecto Hanging Valley Beach, Northumberland Parks
- Waterfalls
- Birding— Folly Gap, Parrsboro Gap, Bird Sanctuary
- Lower Cove (Joggins)
- Four Fathers
- The Alphabet Store (GJDE Enterprises in Oxford)
- Arlene Collins Gallery
- NS Highlander Regional Museum
- Heritage walking tours in Amherst
- Pugwash Estuary boardwalks
- Pugwash Estuary boardwalks
- Great Canadian Trail
- Driftwood Park Beach
- Sea Glass Hunting
- Chase's Lobster Pound
- Capitol Theatre Oxford
- Bubbling tides at Ottawa House (Parrsboro)
- Sport fishing
- High Head
- Celebrity Anne Murray
- Glooscap -Partridge Island
- Wharves (Wallace, Malagash, Advocate, Pugwash, Parrsboro)
- Maccan Tidal Bore (Gordon Boss), River Hebert Tidal Bore
- Tidnish Dock, Tidnish Suspension Bridge
- Tidnish Gallery
- Blue Heron Gallery, Band Day (Parrsboro)
- Minudie Days
- Old fashioned Saturday Night
- Bay Enterprises
- Dulsing
- Foraging
- Forest bathing
- Four Fathers of Confederation

SWOT Analysis

A SWOT (strengths/weaknesses/opportunities/threats) analysis was conducted to provide focus and to help guide the strategic priorities outlined in this strategy. SWOT is a structured planning method that relates the tourism objectives for the Cumberland region to internal and external factors that are favorable or unfavorable.



Five stakeholder engagement sessions were held in communities throughout the Cumberland region at the following locations; Joggins Fossil Institute, Wallace Community Centre, Springhill Community Centre and two in Amherst at the Community Credit Union Business Innovation Centre in Amherst.

The purpose of these stakeholder sessions was to brainstorm the strengths, weaknesses, opportunities and threats in regard to tourism in the region.

SWOT Analysis

The following strengths, weaknesses, opportunities and threats were identified through the consultation process.

STRENGTHS

- Authentic, rural Nova Scotia hospitality- welcoming, friendly people.
- Rich history- traditional way of living/lifestyle- shipbuilding, fishing, agriculture, mining
- Two distinct shorelines
- Access to a variety of regional locally grown/produced food i.e. - maple syrup, blueberries, seafood, wine, craft breweries, produce, farm markets.
- Bay of Fundy– worlds highest tides
- Rich in natural/ecological assets and scenic landscapes - flora & fauna. Wildlife, lakes, oceans, waterfalls, old growth forests, salt marshes
- Museums and Heritage sites- Joggins Fossil Institute, Age of Sail, Fundy Geological Museum, Springhill Miner's Museum, etc.
- Arts & Culture- Festivals- e.g. Fibre Arts Festival, Plein Air Festival, Harbour Fest
- Music- Open Mic, Community Hall events and social gatherings, theatre
- Unique geology of international significance– “Cliffs of Fundy Aspiring UNESCO Global Geopark”
- Safe, relaxing pace of life, a sanctuary
- Outdoor adventures
- Architectural structures (sandstone buildings)





Tourism Nova Scotia— Joggins Fossil Cliffs, UNESCO World Heritage Site

SWOT Analysis

WEAKNESSES

- Lack of uniform signage
- Lack of inventory in terms of unique accommodation experiences- (campgrounds, “glamping”, B&B’s, home shares, hostels, hotels) that will satisfy our three target markets
- Lack of tourism-specific online presence & quality content
- Run-down infrastructure- roads, trails, bathroom facilities
- Cell phone/Wi-Fi coverage
- Lack of a common brand or vision
- Limited electronic vehicle charging stations
- Limited awareness of public coastal access to lakes, trails, waterfalls, and ocean for hiking, kayaking, swimming, sup boards, etc.
- Lack of evening experiences/events
- Minimal world class tourism experiences and packages
- Population/worker base

SWOT Analysis

OPPORTUNITIES

- Development of outdoor adventure tourism experiences- long trail hiking, kayaking, tubing, mountain biking, etc.
- Eco-tourism promotion
- Promotion of our unique geology - “Cliffs of Fundy Aspiring Geopark”, Joggins Fossil Cliffs
- Development and support for cultural events and experiences specifically Indigenous and Acadian cultural history.
- Capitalize on the region’s convenient location and high drive-by-traffic volume
- Four seasons- Increase focus on the development of the shoulder season(s) - fall - fall colors, spring - maple season, and winter - outdoor activities; skiing, snowshoeing, sledding, etc.
- Bus tours
- Cross-promotion. Increase awareness of local tourism assets and experiences (FAM tours) and enhancement through business partnerships.
- Partner with neighboring municipalities
- Short-term rental accommodations– Airbnb
- Ideally positioned to attract researchers from diverse earth science backgrounds and fields- geology, tidal power, ecology, paleontology etc.
- Development of campgrounds i.e. “glamping ”
- Regional unique culinary experiences; foraging dinners, seasonal culinary experiences- blueberry, maple, harvest, seafood, fresh in-season produce, chef- in – residence opportunities, farm tours, clam digging, u-picks
- Work with Bicycle NS and Blue Route to develop, enhance and promote safe, scenic cycling routes
- Waterfall and trail/trailhead development
- Boat launch awareness and increased awareness and need for mapping of public access to beaches and right-of-way

SWOT Analysis

THREATS

- Destruction and depletion of beautiful natural assets as a result of an increase in visitation
- Climate change
- Out-migration
- Loss of historically significant buildings due to neglect or abandonment
- Aging population
- Poor planning for increased visitors
- Loss of access to trails and special places such as waterfalls, shorelines etc. due to an increase in visitors crossing private property
- Shoreline erosion
- Direct competition from similar markets throughout the Maritimes and within the province
- Destruction of natural assets and areas of high touristic appeal and value due to clear cut logging, fracking, exploration mining and poorly sited industrial wind turbines

The Strategic Framework

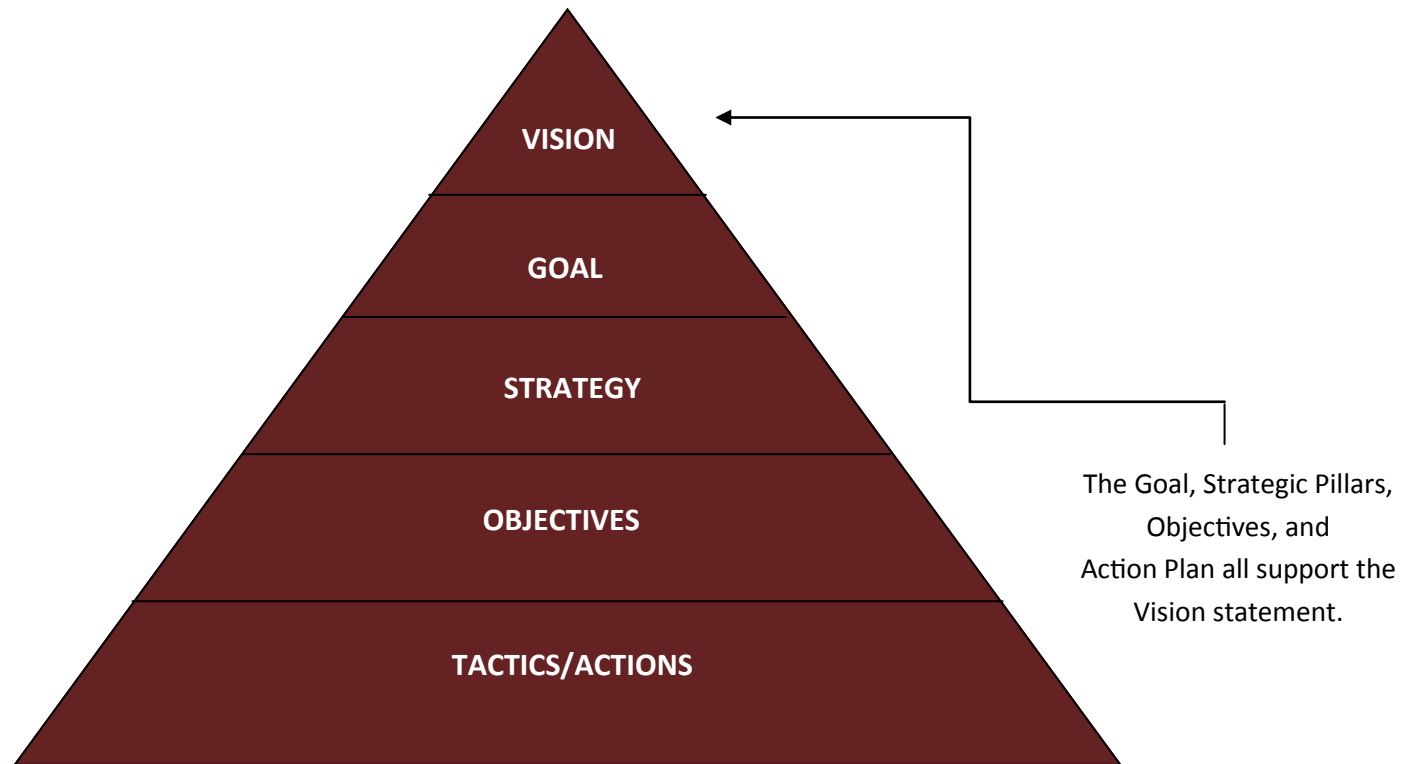
The framework used to complete the strategy is the GSOT model

GOAL — A broad primary outcome.

STRATEGY — The specific approach that will be taken to achieve a goal.

OBJECTIVES — A measurable outcome of this strategy

TACTICS/ACTIONS — A tool used to implement the strategy.



We are confident that we have successfully captured everything that we can realistically achieve that will not leave us spinning our wheels and wasting time on areas we ultimately have no control over.

Vision



The Vision Statement provides direction, guides the strategic goals and includes a perspective of values. A vision is a picture of a future desired situation. It is a description of what we want tourism in the Cumberland Region to look like in the future. The vision draws people together around a common set of ideas about what they would like to achieve for the future. The vision statement gets everything “on track” by building consensus about where you are going.

The crafting of the vision statement was an important piece of work which could only be accomplished following the foundational work involved in the second stage of planning - “the situation analysis”. This stage involved a complete situation analysis including the involvement of stakeholders in completing the SWOT analysis. It is only with a full understanding of where we are, and what we have, can we truly identify where we need to go.

The Visioning exercise was lead by facilitator Alan Walter. Alan guided us through the exercise, provided clarity and a solid summary of the work that had been completed and kept us focused on where we wanted to go, and what we wanted to be perceived as, in regards to tourism in the Region in the future. As a result of this session, and the sessions leading up to it, the committee crafted the vision statement for the Cumberland Region.

“To be recognized as a four-season tourism destination through facilitating the development, enhancement, preservation and collective marketing of our natural, historic and cultural assets, leading to an improved economy and quality of life.”



Wentworth Valley Brinton Photography

The Goal

Goals are clear, concise statements that outline what needs to happen with respect to tourism in the community if you are to achieve your vision. They provide direction for the objectives which are more specific and measurable. The goal reflects the vision, the future desired state of tourism in the Cumberland Region. To make the vision meaningful and achievable, as a committee we converted the vision statement into a set of objectives and actions.

In the Cumberland region we are aligning with Tourism Nova Scotia's strategic plan to do our part in helping reach the provincial goal set out in the "Now or Never" report by the Ivany Commission guide, which is to reach \$4 billion in tourism revenues annually by 2024. Our goal is to increase the visitors length of stay in the region by two days resulting in the average length of stay by "pleasure visitors" to 8.3 days and increase tourism revenues by 1% by 2024 which will result in an additional \$27 million in revenues entering the local economy.

Develop and promote market ready tourism products and experiences that :

Attract more visitors

+encourage them to stay longer

+experience more

= Increased visitation and increased spending

\$81 million in tourism revenues by 2024

This goal will be achieved through a collaborative approach among tourism stakeholders and partners to achieve experience development priorities in the Cumberland Region.

The Strategy



5 Strategic Pillars:

- 1) Collaborative tourism leadership structure
- 2) Destination Branding and marketing
- 3) Sustainable tourism asset development
- 4) Communication, engagement and outreach
- 5) Extend shoulder seasons & develop winter



Objectives

After defining the strategic pillars, we held several sessions defining the objectives and narrowed the list to focus on what makes the most sense, and whether each objective was; specific, measurable, achievable, and realistic. We looked carefully at each objective and asked, “how will each objective contribute to helping reaching the goal?”

Strategic Pillars	Objectives
1) Collaborative tourism leadership structure	Implement the strategy
2) Branding and marketing	Develop brand, marketing and signage strategies to be used to market the Cumberland region
3) Sustainable tourism asset development	Encourage sustainable development of market ready tourism products, support anchor attractions and protect our cultural and natural assets
4) Communication, engagement, and outreach	Improve collaboration, communication, awareness and engagement with tourism stakeholders
5) Extend shoulder season & develop winter	Increase visitation in shoulder seasons and develop winter.

Action Plan

ACRYNOMS USED IN ACTION TABLE LISTED BELOW:

MOC– Municipality of Cumberland **TOA** – Town of Amherst **TOO** – Town of Oxford **CIB**- Communities in Bloom

COC– Chamber of Commerce **TDO** - Tourism Development Officer **TNS** – Tourism Nova Scotia

TIANS– Tourism Industry Association of Nova Scotia **NSITEN**– Nova Scotia Indigenous Tourism Enterprise Network

ED – Economic Development **CCH** - Communities Culture & Heritage **BDO** - Business Development Officer

“Time Frame for Completion” defined below:

Immediate - Current to 1 year **Short-Term** - 1 to 3 years **Long - Term** - 3 to 5 years

1) Collaborative Tourism Leadership Structure

Action	Lead	Partners	Resources Needed	Constraints Issues	Time Frame For Completion	Measurement	Accountability
Identify Steering committee members	MOC	TOA, TOO, MOC	Space, Materials, Human Resources, Funding	Pending councils adoption of the strategy	Immediate— by June 30th, 2019	The committee is formed and functioning	Councils
Create terms of reference for steering committee	TAO, TOO, MOC	TOA, TOO, MOC Tourism Stakeholders	N/A	Time	Immediate	Terms of reference is created and approved by the three municipalities	Councils, the steering committee and stakeholders

Action Plan

2) Branding and Marketing

Action	Lead	Partners	Resources Needed	Constraints Issues	Time Frame For Completion	Measurement	Accountability
Identify sub-committees	Steering committee	Consultants, citizens	N/A	N/A	Immediate	Committees are formed and meeting regularly	Councils and steering committee
RFP to hire consultant(s)-select consultants	TOA, TOO, MOC	TOA, TOO, MOC, ACOA, TNS	Funding	Contingent on funding	Immediate	RFP is completed and consultants are selected	Steering committee and funding partners
Implement strategies	Steering committee	TOA, TOO, MOC, TNS, TIR, Tourism Operators, Dept. of Lands & Forest	-Funding for implementation -Strategies complete to guide implementation	Contingent of funding	Immediate & ongoing	Regional brand is created, marketing strategy is being implemented in phases and signage is created	Councils and private sector
Lobby the province to change boundaries to better represent the Cumberland region	Steering Committee	TNS, COC	Human	The province hearing the regions concerns	Long - term	Boundary is changed to reflect the region	Councils and steering committee

Action Plan

2) Branding and Marketing

Action	Lead	Partners	Resources Needed	Constraints Issues	Time Frame For Completion	Measurement	Accountability
Develop promotional Materials; maps, tradeshow booth, brochures etc.	TDO	Amherst BDO & Staff or Council from Oxford	Content	Branding needs to be developed first.	Short Term	Committee has approved design and materials are developed	Councils & Steering Committee

3) Sustainable Tourism Asset Development

Action	Lead	Partners	Resources Needed	Constraints Issues	Time Frame For Completion	Measurement	Accountability
Complete a market readiness assessment	TDO	ACOA TOA, TOO	Funding	N/A	Short Term	Assessment is complete	Councils & steering committee & funding partners
Focus on supporting the 6 priority demand categories as outlined on pg. 24	TDO	TNS, CCH, private sector, tourism industry reps	Human & financial	N/A	Short term & ongoing	Increase in market ready assets	Councils & steering committee

Action Plan

3) Sustainable Tourism Asset Development

Action	Lead	Partners	Resources Needed	Constraints Issues	Time Frame For Completion	Measurement	Accountability
Partner to increase awareness of the regions cultural heritage	TDO, steering committee	TOA, TOO, MOC, CCH, NSITEN, CANSA, Acadian org, museums	Human, financial	N/A	Short term & ongoing	Strong partnerships are developed and groups are participating	Councils, steering committee, partners
Encourage participation in Tourism NS EXCELLerator program	Steering committee	TNS	N/A	N/A	Ongoing/Annually	New participants in the program	Steering committee
Create themed experiential itineraries for bus tours and solo travellers	TOA, TOO, MOC, private business	Tour bus companies, TNS, private business & organizations	Human, financial—attendance at conferences such as Rendez-Vous Canada and Showcase Atlantic	N/A	Short term	Itineraries are developed	Partners, councils, steering committee

Action Plan

3) Sustainable Tourism Asset Development

Action	Lead	Partners	Resources Needed	Constraints Issues	Time Frame For Completion	Measurement	Accountability
Coordinate Tourism Asset Development Workshops	TDO, steering committee	TNS, TIANs, chambers of commerce, Business Connector, TOA, TOO, MOC	Human, financial	N/A	Short Term & ongoing	Workshops are planned & delivered & reviewed	Councils & steering committee
Support the development of a trails strategy	Municipal recreation staff & committee members	TOA, TOO, MOC, trail groups & associations	Human, financial	Capacity/time	Short term	Recreation staff have begun the planning process	Councils & staff
Coordinate group webinars throughout the region for operators and stakeholders	TDO steering committee	TNS, TIANs, chambers of commerce, TOA, TOO, MOC	Human, financial	N/A	Short Term & ongoing	Webinars are being held throughout the region	Councils, steering committee & partners

Action Plan

3) Sustainable Tourism Asset Development

Action	Lead	Partners	Resources Needed	Constraints Issues	Time Frame For Completion	Measurement	Accountability
Support the enhancement & development of anchor attractions	TOA, TOO, MOC, steering committee	TNS, businesses & tourism organizations, TOA, TOO, MOC	Financial	Access to funding	Ongoing	Annual survey	Councils, steering committee, funding partners
Pursue opportunities for regional culinary tourism development	TDO, TOA, TOO, MOC, Steering committee	Regional producers, Taste of NS, TNS, Select NS	Time	Time for initial contact with potential partners	Ongoing	Food tours, festivals, dining guides, and unique culinary trails developed	Councils, steering committee, partners
Partner to support community beautification initiatives	Steering committee	CCH, Communities in Bloom, chambers of commerce, Boards of Trade, TOO, TOA, COM	Funding	Time	N/A	Local beautification efforts are being implemented	Councils, steering committee, partners

Action Plan

3) Sustainable Tourism Asset Development

Action	Lead	Partners	Resources Needed	Constraints Issues	Time Frame For Completion	Measurement	Accountability
Identify funding opportunities for infrastructure improvements	Steering committee	ACOA, Develop NS, Corporate, Foundations, TOA, TOO, MOC	Human, financial	N/A	Long-term	N/A	Partners
Support the development of market ready & near market ready festivals that improve the visitor experience	TDO & Amherst & Oxford ED employees	Business Community, chambers, CIB, citizens	Human	N/A	Ongoing	Festivals are experiencing growth.	partners
Support the development of demand generator themed festivals & events that extend the season & off season growth	TDO & Amherst & Oxford ED employees	Business Community, chambers, CIB, citizens	N/A	N/A	Ongoing	N/A	Partners
Develop natural asset access map for access to waterfalls, water, trails etc.	TDO, GIS analyst	public, trails groups, rec NS, dept. of environment	Human	Time	Short-term	Access maps are developed	Councils, steering committee, public

Action Plan

4) Communication, Engagement and Outreach

Action	Lead	Partners	Resources Needed	Constraints Issues	Time Frame For Completion	Measurement	Accountability
Coordinate annual familiarization tours	Tourism committee	Tourism operators, ED employees from TOA, TOO	Human & financial	Time	Short term	FAM tours have been executed	Councils and steering committee
Maintain web-site and social media pages	TDO	Tourism Operators, TOA, TOO, MOC	Financial, Human, Social Media Manager	Time/skill	Short Term/Ongoing	Sites are active, and information is current	Steering committee & councils
Create quality, visually appealing monthly newsletters	TDO	Tourism stakeholders, COC	Human/quality images	Capacity	Short Term/Ongoing	Newsletters are created and issued monthly	Steering committee & councils
Create a festivals & events calendar for the region	TDO	Tourism stakeholders, TOA, TOO, COC, CIB	Human	Time	Short-term/ongoing	Calendar has been created and kept current	Steering committee & councils

Action Plan

4) Communication, Engagement and Outreach

Action	Lead	Partners	Resources Needed	Constraints Issues	Time Frame For Completion	Measurement	Accountability
Host an annual tourism conference	TDO	TOA, TOO, TNS, COC, TIANS, TNS, NSITEN, Fox Harb'r	Financial	Time for proper planning	Short-term ongoing	1st Conference was a success- -High registration - Surveys from participants	Tourism committee councils, partners
Investigate funding opportunities to help rural communities with tourism planning using the Guide and the Tourism Strategy as tools.	Steering committee TDO	TNS	Financial	Financial, Capacity	N/A	A community has begun the planning process	Tourism committee, councils, partners.

5) Extend the Shoulder Seasons and Develop Winter

Action	Lead	Partners	Resources Needed	Constraints Issues	Time Frame For Completion	Measurement	Accountability
Communicate vision and strategy with operators, create a survey & organize engagement sessions to gauge interest in extending season	TDO	TOA, TOO, Chambers, tourism stakeholders	N/A	Time	N/A	Engagement sessions and surveys are complete.	Tourism steering committee, councils, partners

Action Plan

5) Extend the Shoulder Seasons and Develop Winter

Action	Lead	Partners	Resources Needed	Constraints Issues	Time Frame For Completion	Measurement	Accountability
Communicate vision and strategy with operators, create a survey & organize engagement sessions to gauge interest in extending season	TDO	TOA, TOO, Chambers, tourism stakeholders	N/A	Time	N/A	Engagement sessions and surveys are complete.	Tourism steering committee, councils, partners
Complete asset inventory for shoulder season– Who is currently open & what experiences can we offer visitors?	TDO	TOA, TOO, tourism operators	N/A	N/A	Short - term	Inventory is complete	Tourism steering committee
Complete asset inventory for winter	TDO	TOA, TOO, Tourism operators	N/A	N/A	Short - term	Inventory is complete	Tourism steering committee

Action Plan

5) Extend the Shoulder Seasons and Develop Winter

Action	Lead	Partners	Resources Needed	Constraints Issues	Time Frame For Completion	Measurement	Accountability
Organize meeting with maple producers regarding the development of maple based experiences in the region	TDO	TOA, TOO, Business connector, maple producers, Gregor Wilson	Human	Finding time to arrange a meeting.	Short - Term	Meeting was achieved	Steering committee partners
Develop maple trail and support the development of maple themed festivals and itineraries	TDO	TOA, TOO, Taste of NS, TNS, NS Select	Financial, human	Time	Short - term	Maple trail is developed	Steering committee councils, partners
Develop fall itineraries	TDO	TOA, TOO, Taste of NS, TNS, NS select	Financial, human	Time	Short - term	Fall itinerary is developed	Steering committee councils, partners

Action Plan

5) Extend the Shoulder Seasons and Develop Winter

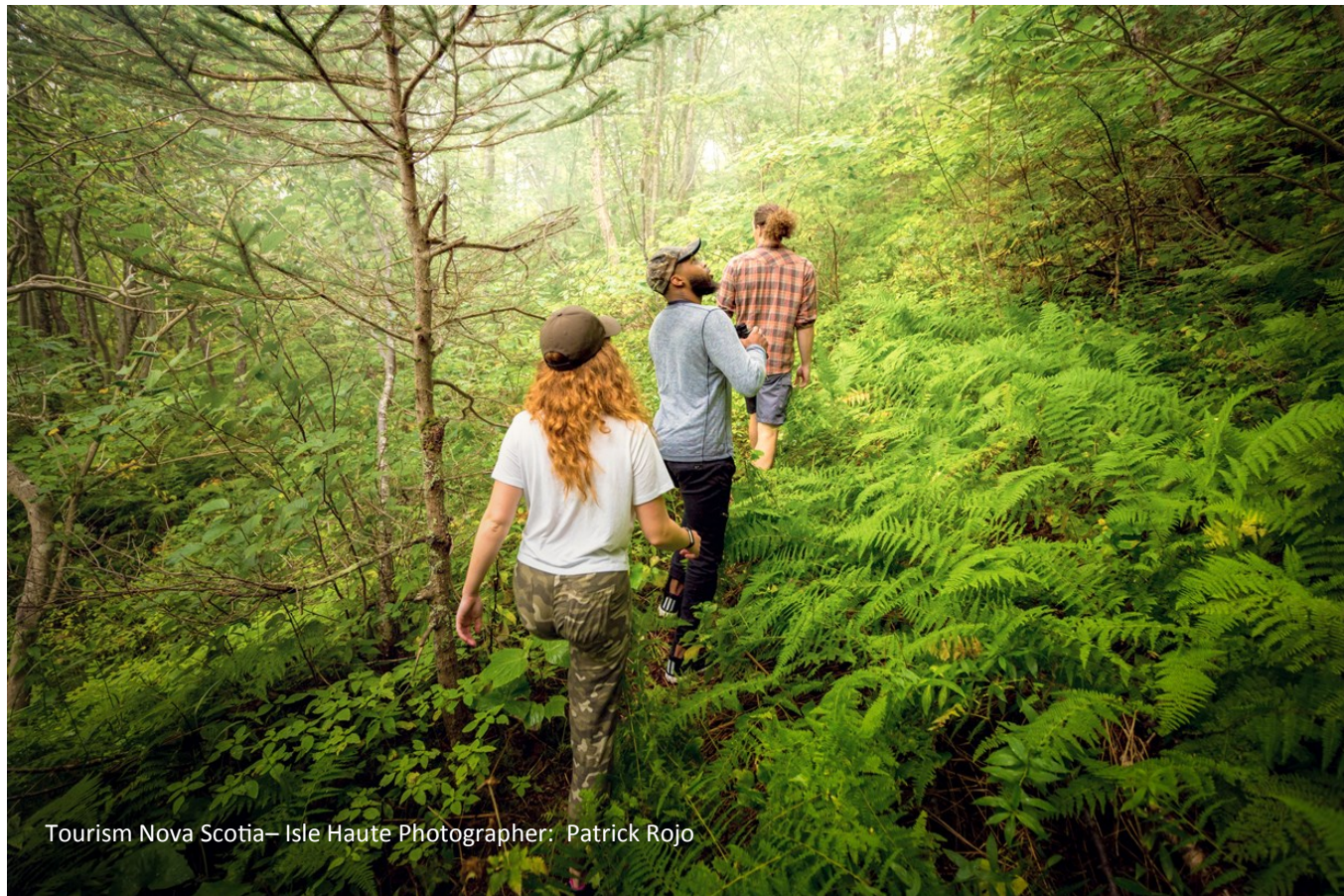
Action	Lead	Partners	Resources Needed	Constraints Issues	Time Frame For Completion	Measurement	Accountability
Develop & support culinary festivals that extend the season i.e.– fall harvest, maple fest, blueberry harvest fest	TDO	TOA, TOO, Taste NS, Select Nova Scotia, food producers	Financial Human	Time for proper planning	Short - term	Festivals are planned, executed and successful	Steering committee, councils, partners
Help identify solutions for seasonal workforce issues	Cumb. Business Connector	TOA, TOO, MOC, NS Works, CANSA, Federal Government, NSCC	N/A	N/A	N/A	N/A	Tourism steering committee, councils
Promote shoulder season and winter experiences	TDO	TOA, TOO, Tourism operators, business community	Human & financial	N/A	Short - term ongoing	Successful development of quality promotional materials	Steering committee, councils, partners

Next Steps

This three-year strategy is a living document, developed by people who live and operate businesses in the Cumberland region and everyone has a role to play in its success.

This document will be reviewed regularly to ensure that it remains relevant and takes into account the trends and changes of the industry. Implementation and review of the strategy will require ongoing engagement with stakeholders to measure success moving forward.

Over the period of the next three years, this strategy, and all action plans implemented are to support the vision, goals, and values laid out in this document.



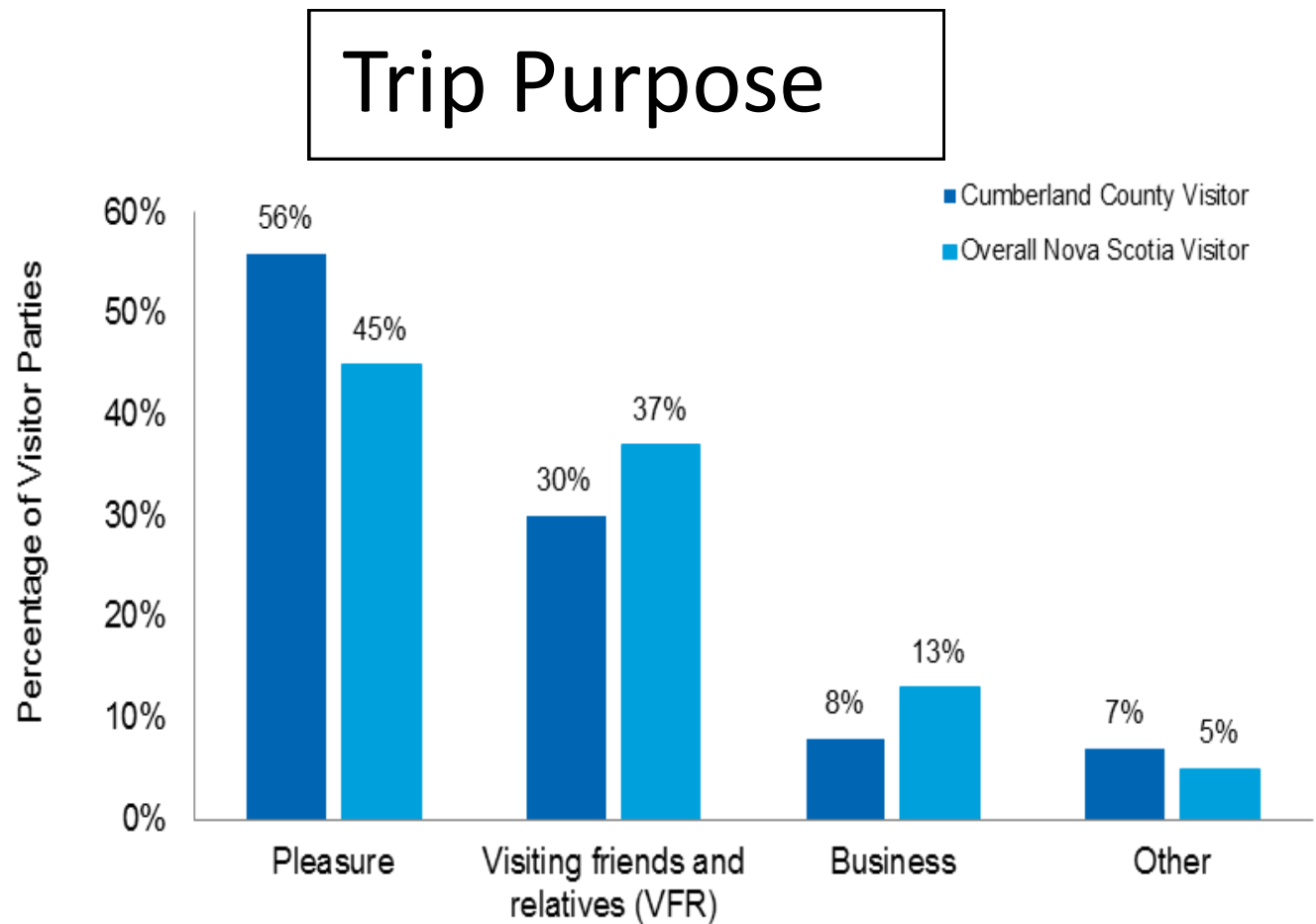
Tourism Nova Scotia— Isle Haute Photographer: Patrick Rojo

Appendix

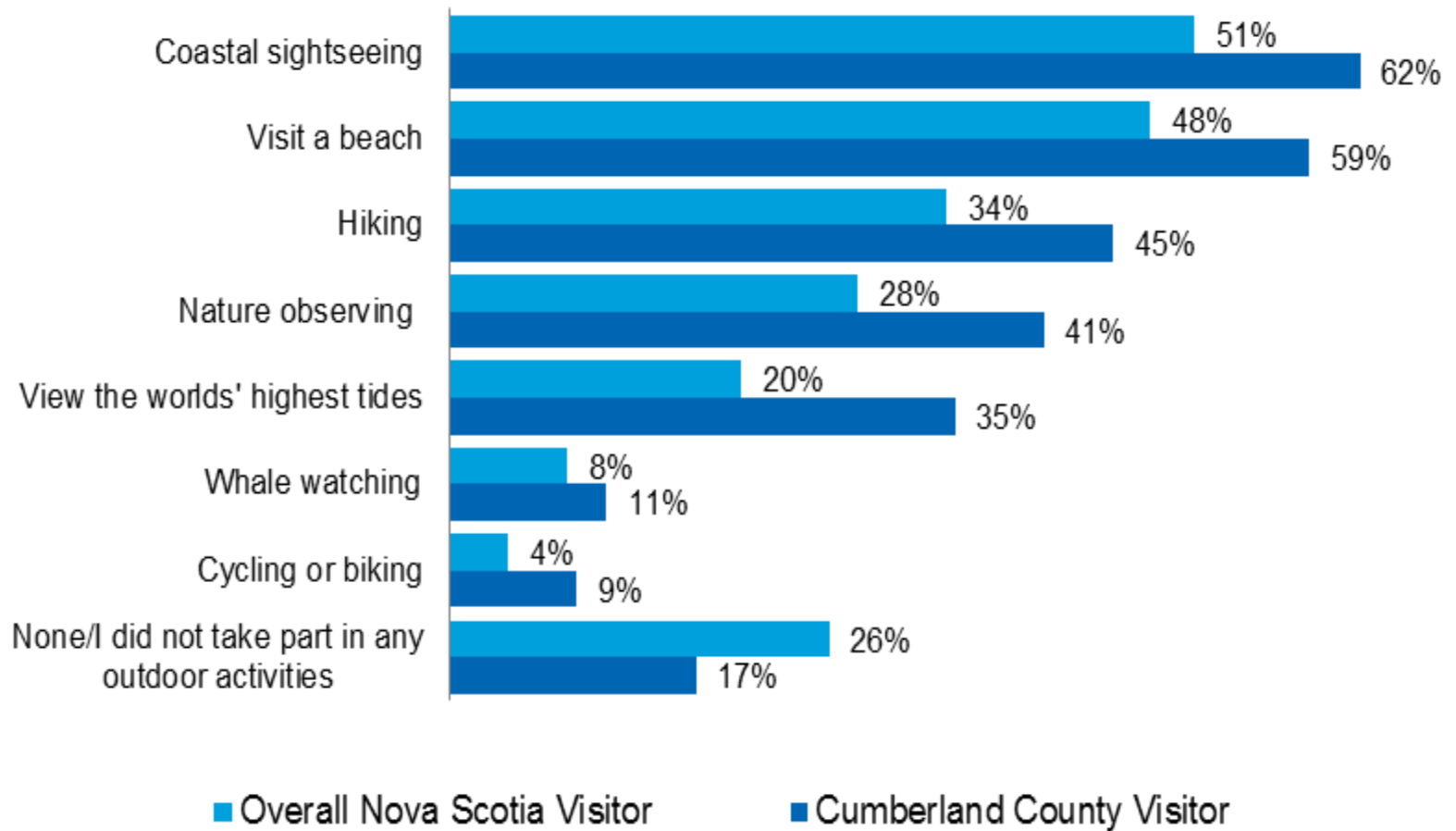
Town of Amherst— Summer Night Market

Visitor Exit Surveys

- Profiles non-resident overnight visitors to Nova Scotia and focused on visitors to the Cumberland Region
- Trip purpose
- Visitor spend
- Areas visited
- Activities
- Satisfaction

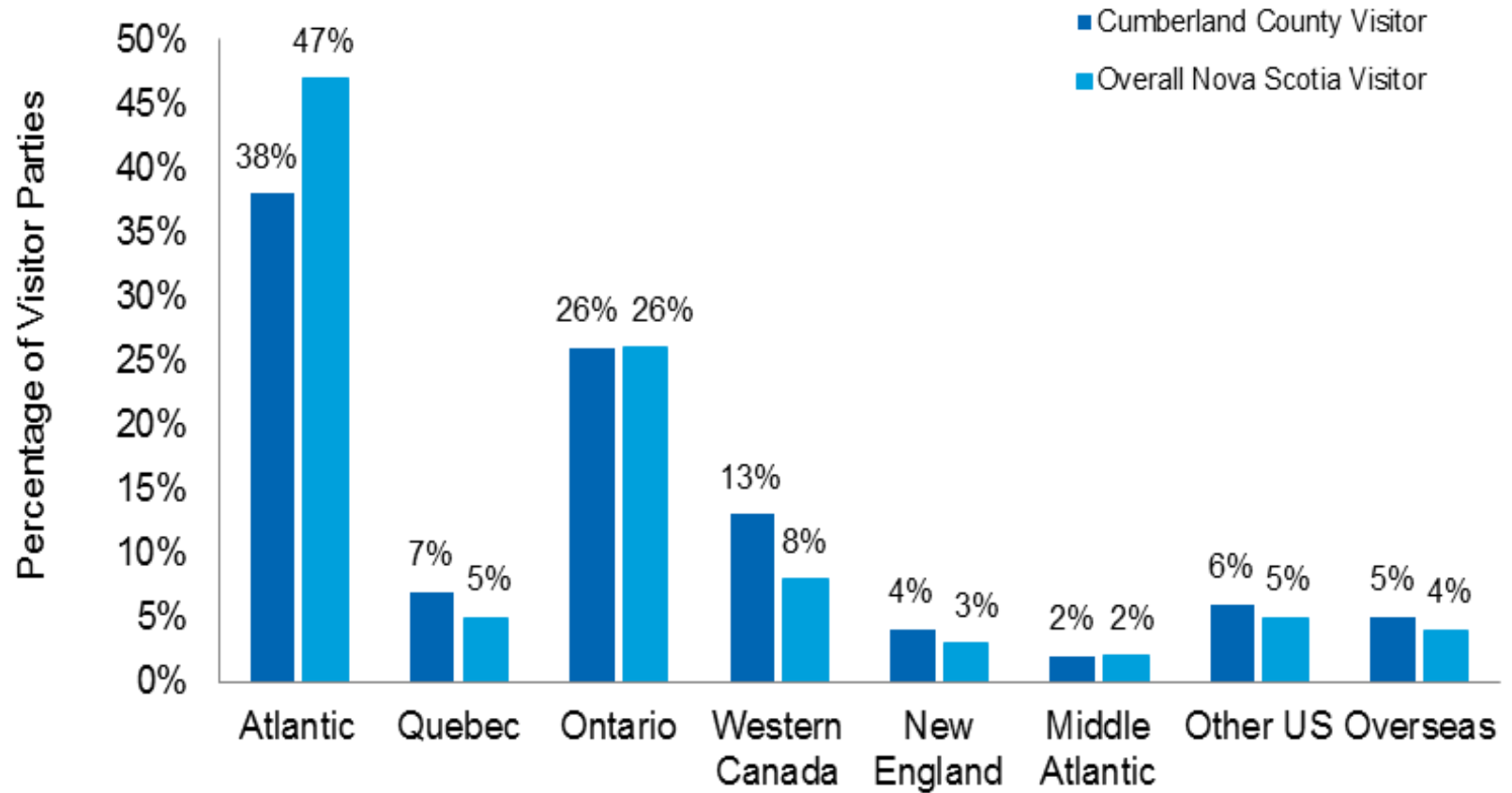


Outdoor Activities – Pleasure Visitors



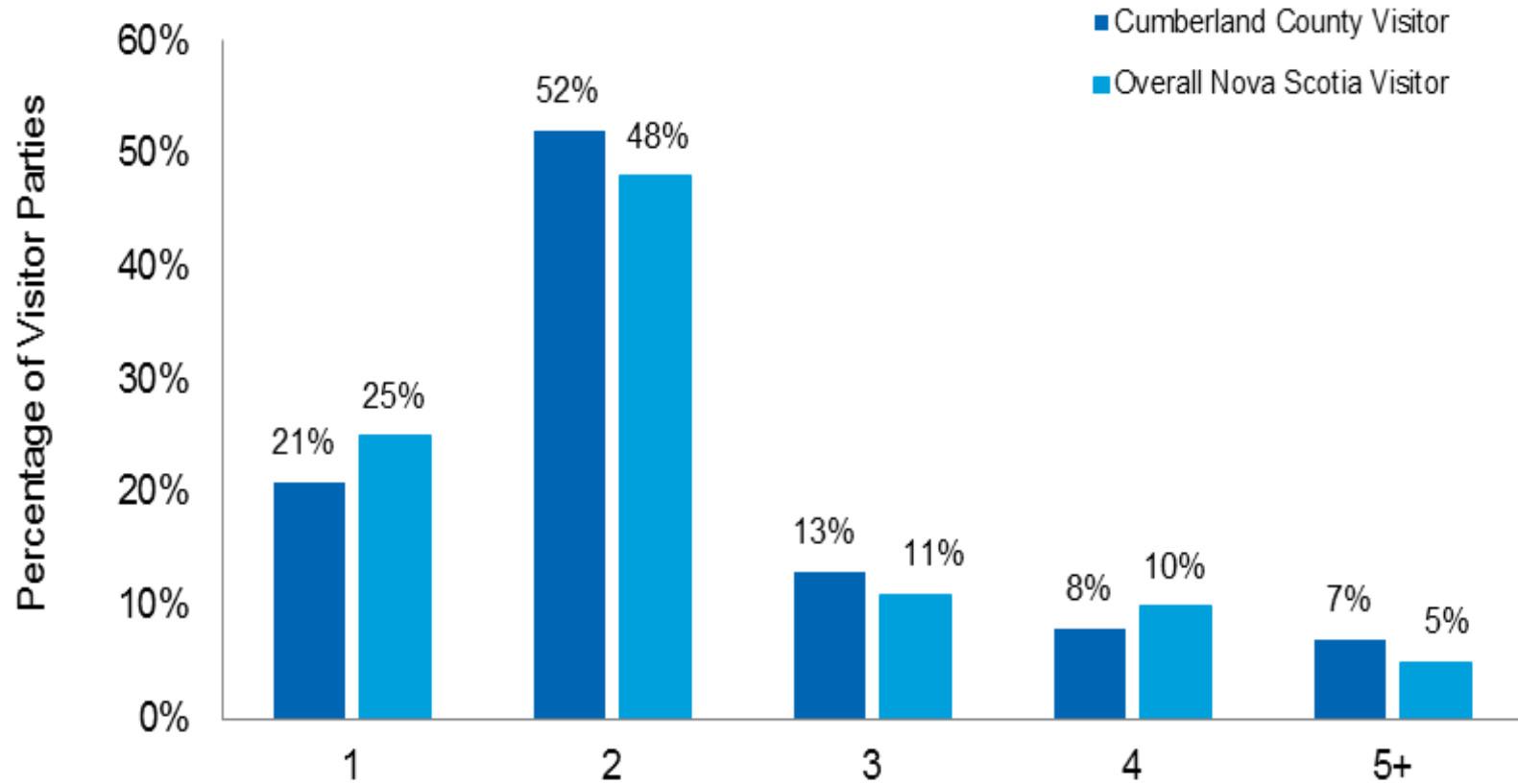
Appendix III

VISITOR ORIGIN

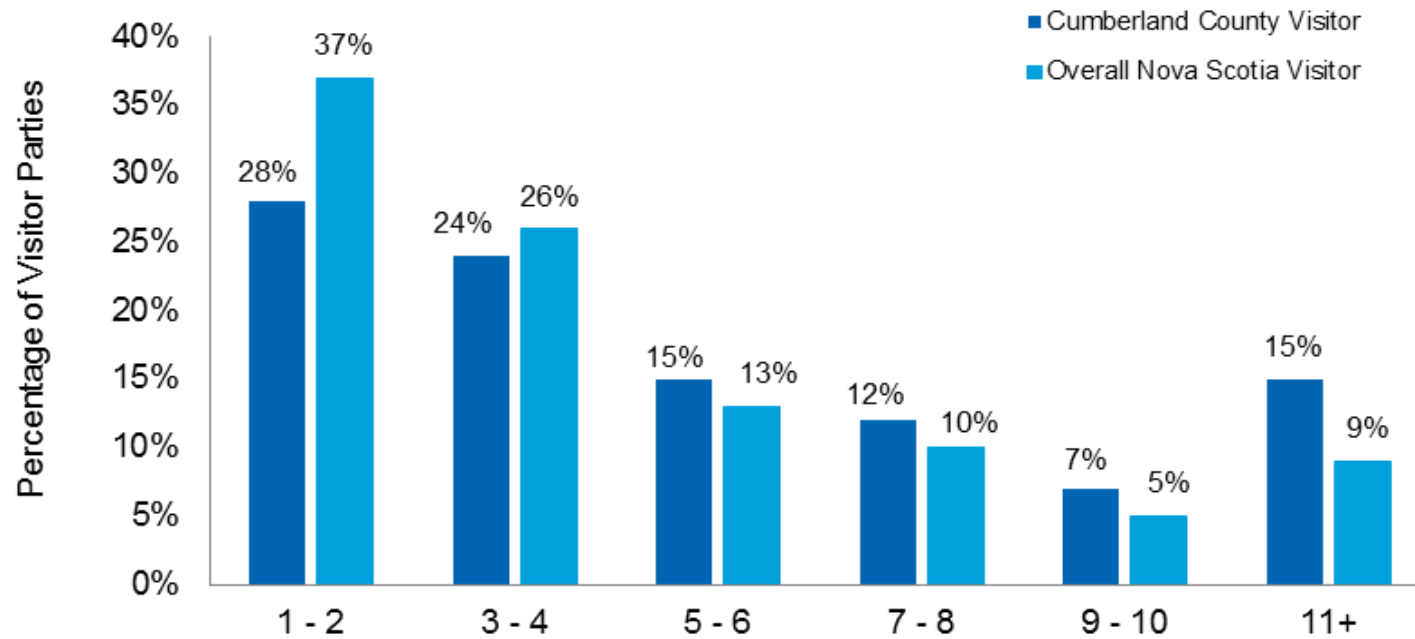


Appendix IV

Party Size



Number of Nights Stayed in Nova Scotia

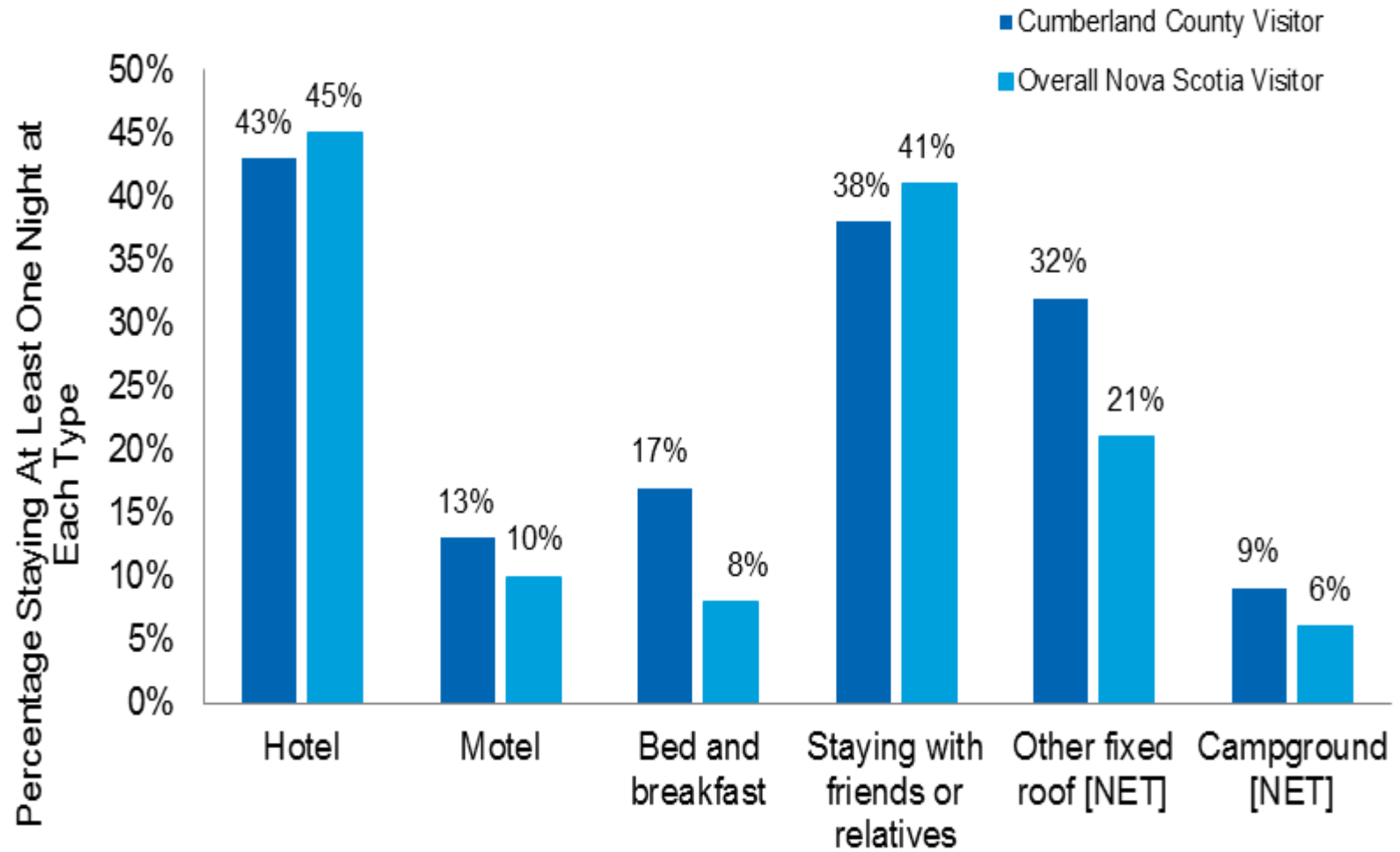


Average Length of Stay

	Overall	Pleasure	Visiting Friends or Relatives	Business
Cumberland County Visitor	6.1	6.3	6.2	3.2
Overall Nova Scotia Visitor	5.1	5.3	5.7	3.6

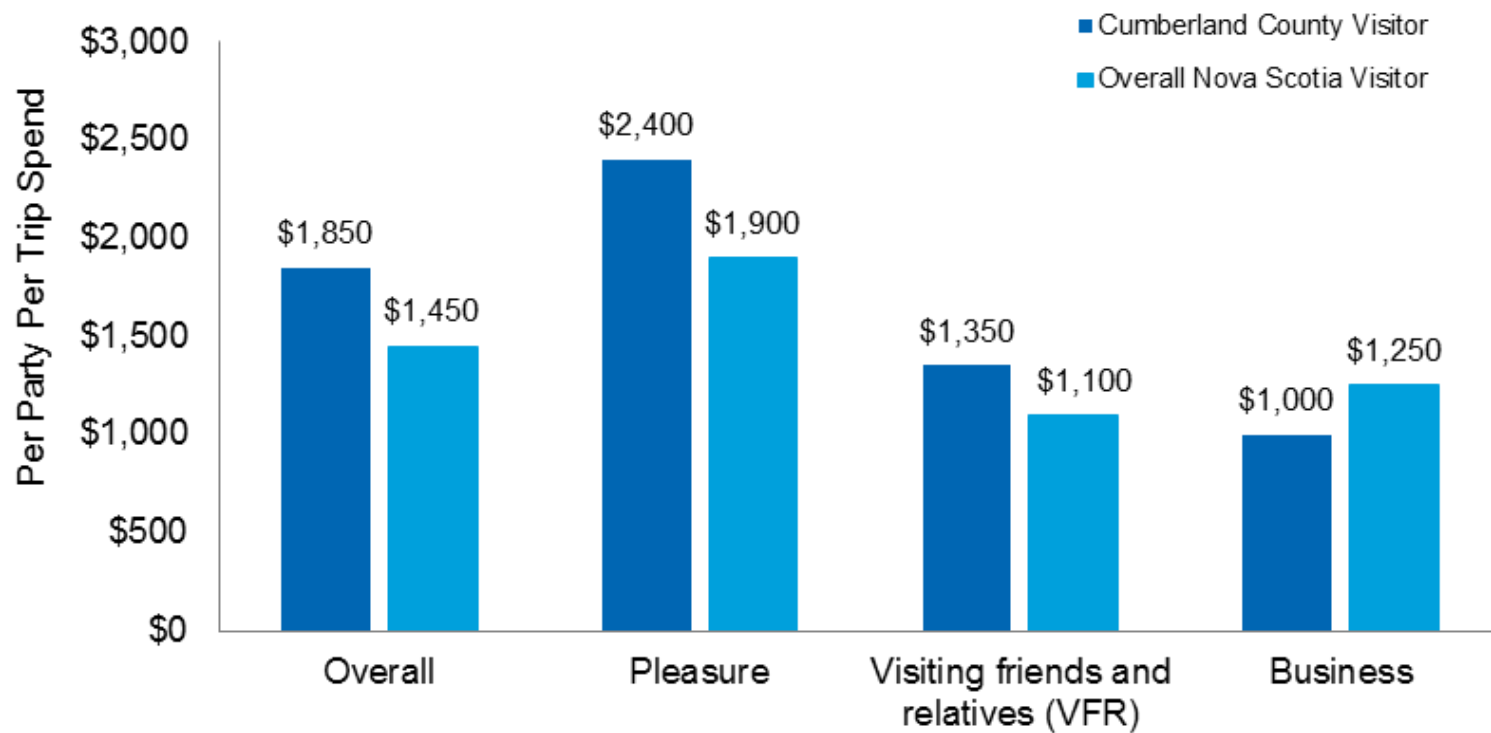
Appendix VII

Where Visitors Stayed



Appendix VII

Visitor Expenditures*



*Includes allocated travel/Excludes major purchases

References

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- 2) <http://www2.unwto.org/>
- 3) <https://skift.com/2018/11/06/five-trends-that-will-shape-experiential-travel-in-2019/>
- 4) <https://tourismns.ca/sites/default/files/Tourism%20Driving%20Export%20Revenue%20Strategy%202018.pdf>
- 5) <https://www.destinationcanada.com/en/tools>
- 6) https://tourismns.ca/sites/default/files/page_documents/final_a_guide_to_community_tourism_planning_in_nova_scotia_nov_2013.pdf
- 7) <https://www.cumberlandcounty.ns.ca/413-community-economic-development-strategy-september-2014-1/file.html>
- 8) https://www.destinationcanada.com/sites/default/files/archive/804-Unlocking%20the%20Potential%20of%20Canadas%20Visitor%20Economy/Unlocking%20the%20Potential%20of%20Canadas%20Visitor%20Economy_WEB.pdf



Tourism Nova Scotia – Isle Haute Photographer: Patrick Rojo