

Final Report
Southwest Nova Scotia
Regional Tourism Partnership

Presented to:

NOVA SCOTIA TOURISM AGENCY

By

GM Event Inc.

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Executive Summary

Following the decision by the membership of the Destination Southwest Nova Scotia Association to cease operations in early 2014, a gap was created in the tourism system.

Based on the coming together of several partner organizations to fill the gap and a spirit of collaboration and innovation, the 2014 tourism season results were positive in many ways. This success demonstrated that the status quo does not have to define the tourism industry or how we are seeking to attract more visitors and ensure that their experience in our province is positive.

The tourism numbers were up in 2014 and stakeholders in the region moved forward in the absence of a formal partnership model as in the past.

After consulting with industry and other stakeholders in the fall of 2014, this report is intended to inform decisions about how tourism can work better both regionally in Southwest Nova Scotia and provincially. Specifically finding new ways to create a visitor-focused approach to attracting customers and providing them with high quality and authentic experiences while here.

People who are invested in the tourism industry spoke about the opportunity to clarify the roles of everyone involved in delivering tourism. People agreed that the Nova Scotia Tourism Agency should lead in the attraction of new first-time visitors to the province. Industry should ensure that the experience for all visitors is positive and meets their expectations of high-quality product and experiences that are unique

and authentic. They also believed that clarity should extend beyond NSTA and industry so that everyone who works, or plays a role, in the visitor experience understands how they can help to drive new revenues and grow the visitor economy.

While there is a natural tendency to move toward the status quo, the input received suggests that tourism is poised for changes that will grow the industry. Marketing is one such example. Rather than continuing with multiple websites that come with costs to operate and maintain, there is an opportunity to leverage the expertise that currently exists with NSTA. They are better positioned to help attract more visitors and provide access to information about deciding on Southwest Nova Scotia.

There was also a clear direction on working to find a more efficient way of managing tourism on a regional basis in order to reduce duplication or in some cases triplication of effort. With limited dollars, there was a desire to focus more resources on marketing while effectively managing the operational and administrative costs of running these regional programs.

The content of this report suggests an approach that will result in a strategic shift in how regional tourism partnerships are managed with a pilot project in Southwest Nova Scotia for 2015. This pilot can be reviewed and assessed to determine its applicability for the rest of Nova Scotia.

It is apparent that innovation is required in how we address the challenges facing the industry.

Overview

Tourism in Nova Scotia is a vital industry to communities and the economy of the province. This is true in all regions. A unique circumstance has arisen in Southwest Nova Scotia over the past year, creating the genesis for this project – a need to examine how tourism is delivered on a regional basis.

The Nova Scotia Tourism Agency's (NSTA) mandate is to work with industry to increase the number of visitors to the province and encourage them to spend more and stay longer, leading to increased revenue and industry profitability for the benefit of all Nova Scotians. Since the launch of Nova Scotia's "A Strategy for Tourism", the opportunity for growth has been clearly identified by attracting first-time visitors to the province. Based on the role of industry and local operators within the tourism sector, the experience that people have and its authenticity to the fabric of Nova Scotia life is a key driver to ensuring that first-time visitors return in the future.

Currently, NSTA partners with Regional Tourism Industry Associations (RTIAs) and Destination Marketing Organizations (DMOs) in all regions of the province for the delivery of the NSTA festival and event program and for the administration of visitor information centre funding to community visitor information centres. The NSTA also provides cooperative marketing funding in order to leverage the investment by industry for promotion of the region to prospective customers.

In early 2014, the membership of Destination Southwest Nova Association determined that the current operating and financial model was not sustainable and proceeded to wind down the association and cease operations.

Following an input process with representatives of the tourism industry, members of municipal governments and other stakeholders, it is clear that the southwest region of Nova Scotia is not only ready for change but seeking proactive and strategic leadership to help them grow and to increase the share of visitors that choose Nova Scotia and experience the wide array of experiences that this part of the province has to offer.

This report will examine the findings of the input session process and will also recommend potential short-term and longer-term solutions to the challenges facing the region in the absence of an RTIA or designated NSTA partner.

Project Scope

This project began in August 2014 and was based on the following deliverables:

- Conduct research in to other comparable regional tourism partnership models throughout Nova Scotia and other parts of Canada
- Facilitate planning session with NSTA staff
- Conduct focus groups, presentations, interviews and/or surveys with tourism stakeholders in Southwest Nova Scotia and if appropriate in other regions to understand the challenges faced by industry and RTIAs/DMOs
- Develop a recommended direction for NSTA on a regional tourism partnership model for Southwest Nova Scotia, which may apply to other regions of Nova Scotia

Process

Based on the project scope, the following was undertaken:

- Research about regional tourism partnership models in other Nova Scotian and Canadian jurisdictions was conducted
- A presentation was developed to include background on the RTIA model and to stress the importance of two current publications, “A Tourism Strategy for Nova Scotia” and “Now or Never: An Urgent Call to Action for Nova Scotians”.
- Five stakeholder input sessions were delivered in South Shore, Yarmouth and Acadian Shores and the Annapolis Valley and Bay of Fundy regions which engaged 251 participants
- An online survey was conducted within the region both for attendees of the input sessions and people unable to attend with 302 valid responses being received
- Meetings took place with the NSTA Board, the Tourism Industry Association of Nova Scotia, economic development agencies, municipalities and other regional tourism industry associations and destination marketing organizations

The intent of this process and the efforts by many was to help to inform a new direction for a regional tourism partnership model for Southwest Nova Scotia and potentially beyond.

To enable the input process, three potential partnership models were proposed as discussion

starters and were positioned as such. It was also noted to all participants in the process that none of the three possible options would be adopted as they were presented.

The three models were:

1. **Regional Tourism Management Organization** – This proposed model featured an organization being selected in each of the three regions that make up the Southwest Nova, including South Shore, Yarmouth and Acadian Shores and Annapolis Valley and Bay of Fundy. The organization would be selected based on majority of industry and municipal support, and the required skills and capacity to meet the outcomes of the partnership. The designated regional organizations would lead the industry and the marketing for the region.
2. **Shared Leadership Approach with NSTA-Led Marketing** – This model would again involve the designation of a lead agency within each of the three areas of Southwest Nova with NSTA leading the marketing for the region, primarily through an enhanced regional presence on NovaScotia.com instead of distinct regional websites.
3. **NSTA Tourism Management Approach** – This model would see the NSTA leading the marketing for Southwest Nova and would focus on the reduction of operating and administrative costs. In this scenario, NSTA would also play a more active role in planning region-wide.

The Challenge

Given the situation with the former Destination Southwest Nova Association and the gap that existed since early 2014, the NSTA is faced with a very real challenge of how it will partner on the delivery of its three program areas:

- Cooperative Marketing
- Festival and Event Funding
- Visitor Information Centre Funding

NSTA has stated publicly that it is committed to developing a new approach to partner with industry while ensuring the best return on government investment and effective administration .

While the immediate need is within the Southwest Nova Scotia region and all of its component parts, this modified approach may be the first step in a larger shift of how tourism programs and services are delivered across the province.

Following the input session process, it became evident that other challenges exist and could influence the approach taken by NSTA to the development of a regional tourism partnership model. These include:

- Shared responsibility between regions of geographical areas or experiences and therefore the marketing is not clear to the customer.
- Some municipalities have reduced or re-directed their funding to tourism.
- In some cases, municipalities have established staff positions for tourism or assigned tourism functional responsibility to existing staff roles.
- The start-up of Regional Enterprise Networks in Nova Scotia could be an opportunity for the tourism industry; however the varied timelines and areas of priority could impact the potential for tourism growth.
- Any regional solution needs to be seen as being both viable and credible to all of industry, municipalities and the other stakeholders within and external to the region.

Findings

Marketing = new visitors and new opportunities –

The most consistent view was that in order for tourism industry operators to grow revenues, they need to be more aligned with the provincial marketing campaign. With this increased alignment, there will be less confusion for the visitor, i.e. reducing the number of websites, travel guides, brochures and other marketing collateral. More emphasis should be placed on increasing the regional presence on novascotia.com and let those with marketing expertise (NSTA staff) focus on connecting more visitors with the complete catalogue of authentic Nova Scotia product and experiences.

“Consistent look and feel – novascotia.com has to be the hub instead of providing visitor with 10 different websites (trying to market).” – Comment from input session participants

No more status quo – Through all of the input sessions and reinforced via the online surveys, there was a clear desire to not repeat any of the previously attempted models for regional tourism partnership. Based on the changes suggested by the OneNS Commission, there was also a desire to move beyond traditional geographic boundaries from within the region and explore ways to work province-wide in order to foster new opportunities for growth.

“One clear central brand is essential and would be guaranteed with this model. Use the marketing know-how the NSTA has (or at least should have) instead of duplicating efforts and each hiring their own ‘marketing specialists’.” – Comment from online survey

Focus on visitor – Rather than subjecting the visitor to our created boundaries which for some could be seen as “false geography”, focus on what will attract more visitors to the province and how we can provide

them with all the experiences they are seeking and more. If it doesn’t help grow revenues and impact the visitor experience, it is not a priority.

“We need a unified, consistent, unequivocal face for tourism in Nova Scotia. Regional marketing is confusing to the visitor. We need a single point of contact for industry - no confusion over which agency deals with what. Allows partnerships to form with no ‘false geography’ in the way. Opportunities for business-led initiatives.” – Comment from online survey

oneNS growth target – With goal #14 by the oneNS Commission positioning the growth target as doubling tourism revenues to \$4 billion, there is a strong desire within the region to be part of something bigger and working beyond traditional boundaries to explore opportunities for revenue growth.

“It is not about regions. It is about bringing more people to Nova Scotia and the sooner the “protection” mentality is changed the better for tourism as a whole.” – Comment from online survey

Efficiency that allows for responsiveness – Both industry and municipal governments are seeking a more efficient model that avoids duplication and triplication of effort.

“A change is needed; provincial dollars would be better spent on marketing and product development than on administration of regional tourism association. Tourism industry operators would feel that they had more control of their own destiny.” – Comment from online survey

Industry and stakeholders want to be part of the solution – While administrative and operational efficiencies are required, the region is seeking the opportunity to provide input that may ultimately help inform the plans of NSTA and other partners, and growing visitation and revenues.

“It is important to have a regional presence to understand specific challenges in each region but a global perspective of the whole provincial tourism picture is also required to provide leadership and guidance to each region to have a similar look and feel to tourism in each region.” – Comment from online survey

Barriers to success – While there are many potential obstacles to help grow tourism at the regional and provincial levels, the degree to which political or other influence may be exerted could directly and negatively impact the industry.

“It should be an agency that has the business acumen to evaluate spend properly. Be able to effectively reach the entire region. And should not be influenced by lobbying but rather by a business-like approach and be able to understand how and where we need to increase Tourism.” – Comment from online survey

Recommendations

1. Ensure that the roles and responsibilities of the NSTA, regional organizations and tourism industry operators are clearly identified. These should be socialized to all and communicated widely so everyone can see their role in helping to grow the number of visitors and the revenues.
2. A more proactive and purposeful approach to the customer sales cycle should be adopted. With NSTA focused on attracting the first-time visitor from outside the province, industry operators play a key role in this process by ensuring that their product offering is clear and market-ready in order to convert the sale. Once the visitor comes to Nova Scotia, industry operators are crucial to ensuring the visitor experience is a positive one. They can ensure that they are ambassadors for other experiences that ensure the visitor can “spend more and stay longer”.
3. A model that optimizes operational efficiencies and minimizes administration is critical to maximize the return on provincial funding.
4. To make informed decisions as outlined in “A Tourism Strategy for Nova Scotia”, decisions should be business case driven and include full transparency and accountability.
5. Establish a model for Southwest Nova Scotia that can be evaluated and improved with review for potential application in other regions of Nova Scotia.
6. Given the situation over the past year in Southwest Nova Scotia as it relates to regional tourism management, it should be understood that the approach for 2015 will be impacted by time and financial constraints. This process will continue to evolve and will require ongoing communications to manage both expectations and changes that may occur throughout the next 12-18 months.
7. In order to ensure that programs are both effective and meet the accountability standards for public funds, any funding programs should include specific and measurable goals and objectives along with providing potential user groups with clear reporting requirements.

2015 Recommended Approach

Based on the requirement to prepare for the 2015 tourism year, the following approach is recommended:

1. Provide clarity on roles for NSTA and industry i.e. NSTA will focus its marketing on attracting the first-time visitor from outside the province while industry will continue to “own” the visitor experience and convert first-time visitors into repeat customers.
2. Operate in 2015 without designated regional tourism management organizations. By most accounts, 2014 worked well with sharing of responsibilities and division of effort amongst many partner organizations. Moreover, the process to call for, evaluate and select regional tourism partners would not be an effective use of time or resources. Additionally, there are many organizations that can play a role and help to manage the transition of the pilot model approach for 2015 and some organizations, i.e. Regional Enterprise Networks (RENs), are in the formative phase and may not be in place in time to have a positive affect on the tourism season in 2015. This will mean that funds ordinarily allocated for operational or administrative purposes can be re-directed to manage any incremental costs associated with this transition such as additional human resources required by NSTA or partner organizations to effectively administer 2015 programs.
3. It is critical for NSTA to work directly with regional organizations and other partners to populate and enhance the regional content for Southwest Nova Scotia on novascotia.com. This may involve the decommissioning of some regional websites and establishing unique URLs on novascotia.com. This can result in cost savings at both the regional and provincial levels through the co-operative marketing program.
4. Develop a pilot program for 2015 that will provide cooperative marketing funds for initiatives based on an application process. The NSTA should not be providing core funding to manage marketing initiatives. This will provide more marketing funds to meet the demands of the region.
5. Conduct a full review of the festival and events program to determine if it meets the objectives as outlined in “A Tourism Strategy for Nova Scotia”.
6. As in 2014, seek the agreement of TIANS to serve as the administrative partner to oversee the local/regional VIC funding program. Review the VIC program in 2015 to lead to greater efficiencies.
7. There was significant concern expressed over the regional boundaries especially as it related to the Bay of Fundy. It is recommended that a review be conducted of these regional boundaries to determine how this can be better managed and this review should include other regions that have an interest with the Bay of Fundy

Conclusions

It is clear that the Southwest Nova Scotia region is poised for change. After the return of the Yarmouth Ferry in 2014 along with the renewed Digby Ferry, and the innovation that is taking place by individual operators and sub-regions, the energy exhibited by participants in this process was both impressive and encouraging.

The next steps may play a role in how the NSTA and industry are addressing some long-standing and emerging challenges so that we can focus on what matters...growing revenues from tourism by attracting first-time visitors.

This project had intended to come up with a specific and defined model but after the input phase and in

consideration of the timing leading into 2015, a more progressive approach is in order. This approach will require collaboration and commitment of all to not allow the change to distract from the task of attracting visitors and delivering quality experiences.

This report does not suggest change for the sake of change but a measured approach to ensure that long-term strategic shifts and short-term tactical plans can be made in line with the Nova Scotia tourism strategy and the new approach to growing our economy.

It has been a pleasure to work on this project and I sincerely thank all those who participated in the process and are committed to growing tourism in Nova Scotia.

Appendix A – Input Session Presentations

Regional Partnership Model for Tourism in Southwest Nova Scotia

Regional Input Sessions (Outline) October 2014

Session Objectives

- Determine most effective way to spend provincial dollars to grow tourism and impact visitor experiences
- Align regional tourism efforts with provincial marketing and tourism strategy
- Clarify roles to minimize confusion/duplication
- Seek input on funding models

Reflecting on Existing Strategies

- A Tourism Strategy for Nova Scotia
- Now or Never: An Urgent Call to Action for Nova Scotians (One Nova Scotia)

Elements of RTIA Partnership Agreements

1. **CORE Funding** (*Southwest Nova Scotia – \$108,000*)
 - Program Administration
 - Consolidated, brand-consistent content in provincial literature
 - Communication to industry through RTIA/DMO channels
 - Meeting Support
 - Media Assistance
2. **Cooperative Marketing Projects** (*Southwest Nova Scotia – \$105,000*)
 - (matched 50% by industry)
3. **VIC Funding & Training** (*Southwest Nova Scotia – \$50,400 for VICs*)
 - Quality Assurance
 - Training
 - Consolidation of Monthly VIC Statistics
 - Administration of VIC Funding Program (formerly known as PEP)

RTIA/DMO Model SWOT Analysis

- **Strengths**
 - Regional approach gives industry a voice
 - Industry matching model for provincial government dollars
 - Simplify administration for regional tourism
 - RTIA/DMO Model SWOT Analysis
- **Weaknesses**
 - Lack of industry and municipal support causes fragmentation, organizations competing for funds and diluted effort
 - Regional organizations are not aligned with tourism regions
- **Opportunities**

Develop a new partnership model that will:

 - Allow us to work better together to grow tourism revenues
 - Result in more effective use of financial and human resources
 - Result in greater marketing impact
- **Threats**
 - Lack of engagement/buy-in
 - Fear of change

- Achieving consensus among groups with different agendas
- Efforts not aligned with NSTA's marketing approach and regional boundaries

The Questions

- What are the challenges with each option?
- What are the strengths of each option?
- Considering the funding sources available, what could a possible funding model look like?
- Would you recommend any changes to the option as it has been proposed?

Exercise 1

Option A: Regional Tourism Management Organization

- One designated regional tourism organization for each tourism region
 - Yarmouth and Acadian Shores
 - South Shore
 - Annapolis Valley & Bay of Fundy
- Organization is selected based on majority industry and municipal support
- Organization must have demonstrated capacity to deliver on responsibilities (financially and skills)

Exercise 2

Option B: Shared Leadership with NSTA Led Marketing

- One designated regional tourism organization for each tourism region
 - Yarmouth and Acadian Shores
 - South Shore
 - Annapolis Valley & Bay of Fundy
- Organization is selected based on majority industry and municipal support
- Organization must have demonstrated capacity to deliver on responsibilities (financially and skills)

Exercise 3

Option C: NSTA Tourism Management Approach

- No 'designated' regional organization
- Tourism-focused organizations can do what they like but must raise funds to achieve outcomes
- Provincial government tourism funding to groups would be project-based via NSTA funding programs

Summary

- ✓ Determine most effective way to spend provincial dollars to grow tourism and impact visitor experiences
- ✓ Align regional tourism efforts with provincial marketing and tourism strategy
- ✓ Clarify roles to minimize confusion/duplication
- ✓ Seek input on funding models

Q&A

Appendix B – Input Results by Model

Option A – Regional Tourism Management Organization

Option A – Regional Tourism Management Organization Challenges

- Gain industry support
- Organization that will represent all the region
- Supportive of the “collective”
- Eastern end of the region doesn’t make sense
- Many municipal units
- 3 organizations could dilute the amount of \$ = spread too thin
- Must demonstrate value to region
- Volunteer organization – difficult to do this
- Define the boundaries i.e. Annapolis Valley and Bay of Fundy and Yarmouth and Acadian Shores
- Municipal funding support
- Overlap
- Lack of collaboration
- Inconsistency
- Not a holistic approach
- Not niche tourist inclusive (border driven)
- Doesn’t align with region as currently defined by REN boundaries
- Finding organizations with the capacity to pull it off
- Budget/3
 - Approx. \$200k
 - 29 municipal units
 - 25 VICs
 - 3xED; 3x EA
- Increase competition, decrease communication
- Funding split? How? VICs?
- Not enough assets to compete
- Gene pool too shallow for getting volunteers
- What are the challenges of the other regions?
- Too many layers – duplication or resources
- Consistency of marketing
- Unnecessarily spending time & \$ on collateral pieces on an individual municipal level
- Difficulty seeing each other as a collective; individual areas will be focused on themselves
- Combine previous models to consolidate efforts
- Coordination of efforts
- Large area
- Voice of separate areas may get lost

- Personalities/politics
- Boundaries
- Lack of collaboration within the region i.e. South Shore – Peggy’s Cove – Shelburne County
- Duplication of roles
- Lack of cross promotion
- Exclude Peggy’s Cove from South Shore (Lunenburg, Queens and Shelburne only)
- Too many challenges for new group
- Municipal units not working together
- Shag Harbour to Hubbards too big an area
- NSTA works for us
 - Reminder – we don’t work for you
- Buy in
- Geographical boundary (too big)
- Deciding where the \$ goes
- Looking at member based models carefully
- More uniform branding
- A lot for RTMO to do unless well resourced - \$ human resources
- Large geographic area
- Prevent partnerships beyond boundaries
- Funding
- Boundaries – align
- Industry buy-in
- Non-profit buy-in (support)
- Extra layer of bureaucracy
- Duplication of infrastructure
- Getting buy-in across region
- Competition within the region
- Not enough core funding
- Municipal buy-in
- Quality, not quantity
- Size is still large/diverse
- Funding 1/3 split?
- Collaboration with municipal
- Duplication with existing groups
- Boundaries
- Funding (administration)
- Competition for funding
- Volunteers
- 3 entities may still be too big (few common areas of interest)
- Borders/boundaries should be defined by commonalities
- How will RENs be involved
- How to get larger contributions from municipal units

- Lack of leadership – knocking down empires
- Measurable – accountability
- How do you select regional positions
- Large geographic region
- Gone back 10 years to a model that didn't work
- Not reaching individual operators themselves i.e. accommodations can have 4+ groups represented
- No time to read emails from chamber, RTIA, NSTA, municipality, etc.
- People are busy/too many layers
- Need to hear voices of smaller businesses (1-2X per year meet)
- Funding only went so far i.e. 30,000+/smaller region
- Duplication
- Competition among regions
- Brand identity/lack of consensus
- Municipal boundaries for funding partners
- Distance
- Communication
- Municipal buy-in
- Competition
- Focus on borders
- Industry in-fighting
- Easier to manage smaller territory (destination model too much area to cover)
- More opportunities for partnership development
- Common challenges in regions as opposed to province wide
- Better local marketing opportunities
- Getting municipality to agree
- Getting industry to buy into
- Limited funding to accomplish what region would need
- Financial
- Require coordinating body – define parameters, skills, funding
- Consensus building
- Defined shared and separate administration
- Reluctance to buy-in
- Duplication with existing organizations or existing boundaries (REN)
- Financial sustainability
- Closing existing tourism offices to create new ones?
- Naming the regions
- Narrow regional focus
- Not visitor focused
- Hasn't worked in the past
- Inconsistent messaging between boundaries
- Admin capacity

- Too much collateral (brochures, etc.)
- Fragmentation
- Duplication
- Not efficient
- Communication
- Competition
- Areas not proportionally sized
- Insufficient funds
- Developing municipal consensus
- Danger of diluting the brand (NSTA)
- Avoiding stakeholder role confusion
- Minimizing loss of experience
- Regions (Bay of Fundy too big)
- Diversity of areas
- Marketing becomes segment based on boundaries
- Can become challenging to partner with other operators/regions (because of funds)
- Coming up with a funding model that will work
- Challenges for cross-regional co-op efforts i.e. Annapolis Royal and Clare project 2 regions
- Can we fund three separate staffs/organizations? IS that more money to staffs and less to projects?
- Geographic based division is perhaps not best
- Equitable distribution of funding
- Design of a new model
- Huge territory
- No municipal unit participation in RDA
- Professionalism
- Multiple administrations
- \$, ¢
- Triplication
- Funding (equality)
- Regional boundaries
- Selling too many regions
- Regional boundaries
- Getting all industry & municipal partners on one team
- Finding an organization that could put a solid plan into place and operate within the financial funding available
- Too much money being used for administration
- How do we know how much funding the region needs
- The smaller better to relate in the geographical area
- Duplicating marketing costs
- Three categories do not define SW NS – SW NS requires definition
- Geographical size of Annapolis Valley

	<ul style="list-style-type: none"> • Overlap of RTIA & other tourism associations • Polarization/fragmentation of representation & funding
Option A – Regional Tourism Management Organization Strengths	<ul style="list-style-type: none"> • Demonstrated in 2014 AVCC • Foundational work/relationships begun • VICs and industry have relationships • One voice for the region • “Annapolis Valley” is a brand • 3 sub-groups makes sense because each region to diverse • Organization – tourism industry led with a welcoming broad base • Industry support • Local knowledge • Local buy-in • Easier for industry networking • Smaller is more streamline • Region broken into manageable “smaller” pieces (3) • Expertise is out there • Specialization, identity, culture • Closer to local councils for \$ • Product and interests in common • One voice supporting • Better communication • Coordination of efforts • Allow focus of itinerary • Easier for local groups to know who to work with • Clear defined areas • Unity of themes – lighthouses, fall events, etc. • More personal – smaller area to promote • Similarities in each region • Equal representation between related areas • Every community gets an icon • Local knowledge • Local sensitivity • Less costs? • More uniform branding • More commonality within region • Staff better able to know product and local dynamics • Closer proximity for meetings • Better access to funding • Matches closely to Provincial tourism regions • Aligns with natural culture and travelways • Smaller than DSWNA • More focused • Easy to market

-
- Easy to manage
 - Gives the region a voice within NS
 - Efficient decision making
 - Similar tourism product – regional flavor
 - Existing partnerships amongst decision makers
 - Smaller, tighter
 - May align with REN – net economic development model for the South Shore
 - Smaller area
 - Share more common ground/experiences
 - Easier to market
 - Focus
 - More grassroots
 - Opportunity for more voices to be heard
 - Improvement from DSWN
 - Smaller units have greater opportunity for volunteer base
 - Smaller units have greater opportunity for authentic experiences
 - One big voice spreading the word
 - Regional body has “networking” opportunities
 - One rep from each area
 - Status quo is not an option why would we suggest repeating past practice?
 - More focused, smaller regions
 - Needs to be a connection across NS – need to have the “One NS” concept
 - Can look at this differently
 - Need fewer organizations that are like nerve cells feeding in
 - Move beyond “territorial”
 - Cluster by iconic experiences (i.e. Bay of Fundy) not the geographical region – follow Roger Brooks recommendations i.e. surf spots, hiking, birding
 - Look beyond geographical boundaries to meet needs of visitor
 - Keep it simple and connected and complementary to NSTA
 - Focus on effective organization – tourism hubs
 - Focus on top 10 by destination/experiences
 - Top 10 in NS by travel pattern
 - Regional awareness/expertise
 - Local connection/partnership opportunities
 - Local knowledge and culture
 - Similar experiences
 - Not a big change
 - Working together
 - Less knowledge transfer across regions
 - Limits marketing when geographic boundaries became an “end point”
-

-
- Harder to market the province as a whole
 - Provide common message
 - Focus on the needs of the region
 - Eliminates duplicity
 - 3 separate unique groups
 - Focus on regional priorities
 - Inclusiveness with colleagues
 - Interact with different tourist attractions within the region – travel within the region
 - Fresh start
 - Locals know
 - Region leads their own path to growth
 - Closer relationship – experience/product/industry/festivals and events
 - Engaged locally
 - We know best what YAS stakeholders want most
 - Trust will be generated if region is advocating for itself
 - Region can better develop its own product
 - Each area has a more marketable region
 - Potentially more industry buy-in
 - Can work with province to align regions
 - Smaller DMOs keep it more local with a more focused vision. Better understanding of community needs.
 - Greater ability to be visible in the region; to be relevant
 - Greater opportunity for thematics with small regions
 - Design a new model for ourselves
 - New model would invite new municipal support
 - More local identity
 - Easier buy-in
 - Industry led cohesive approach
 - Sustainable – year to year funding
 - One stop shop for industry
 - We see no strengths in this model however our diversity has not been capitalized
 - Potential of concentrating decision making in smaller area
- | | |
|--|--|
| Option A – Regional Tourism Management Organization | <ul style="list-style-type: none"> • Municipal/provincial/? Industry support • Tourism levy • Plus core |
| Funding Model | <ul style="list-style-type: none"> • All levels of government recognize that tourism is an industry with potential; this includes industry; everyone; industry membership • Cooperative between industry and government (municipal and provincial) • Core funding • Equal distribution of funds and how that is decided (population, |

- industry, geography, etc.)
- Industry levy
- Contributions based on per capita
- All of the above with management
- MLAs?
- How will it be allocated/distributed?
- Limiting administrative costs in order to direct \$ towards tourism initiatives
- Based on per capita?
- Rotate big marketing dollars each year
- Business owners take responsibility for their own marketing first then participate in “local” tourism board then South Shore
- Provincial/municipal/industry/in-kind
- Sustainable/profitable/incentive or performance based
- Fair
- Memberships (account for SIU)
- Levy (rooms or other models) provincial mandate
- Municipal support (all/fair)
- Use REN support
- 1/3 municipal, 1/3 province, 1/3 industry
- + 50%
- Population/municipal
- Industry
- 50/50 is important
- Flexible funding approach (administration)
- Possible 1/3 funding from each entity (Annapolis/South Shore/French Shore
- ¼ from each and then larger pot to draw from (leverage)
- Reinvestment of tourism revenues and taxes that arise
- Province > “one voice” > to committee for district
- Combined strategy starting at grass roots levels on up to region then Province
- Municipal funding
- Industry
- Levy
- 50% provincial 50% municipal/cop-op \$ with stakeholders
- Province and municipality does initial core funding
- Not a membership model
- Public/private split on marketing and product development
- For profit businesses should be allowed to apply for funding
- Marketing partnership with private industry and government
- Provincial/municipal/industry – matched dollars
- Levy
- European example (1 Euro per visitor)

- Formula funding (population, area, tax base, attractions, etc.)
- Municipal/private/provincial
- Room levy
- ACOA
- Tiered partnership to accommodate stakeholder levels
- But no paid membership
- Work with existing organization to save on administrative costs
- Municipal units contributing
- Membership \$?
- Industry involvement a must
- Drive by industry
- Flexible region boundaries
- Core – NSTA, municipal based on tax/accommodation (formula)
- NSTA/Municipalities/industry through a levy system involving all businesses
- Membership driven/fees (industry)/municipal investment/relationships with Chambers of Commerce and Boards of Trade/provincial investment
- Equitable distribution of funds is problem
- Huge territory?
- How is funding supported
- Pay VIC staff more
- ??
- Levy?
- Must be a buy-in by industry/municipal/towns based on population
- Overall funding matching based on municipal & industry funds by province
- Marketing levy stays in region

**Option A – Regional
Tourism
Management
Organization**

**Recommended
Changes**

- Leave the North-eastern (Truro) region of Bay of Fundy remain with Central
- No elected municipal officials or staff (INDUSTRY LED)
- Reducing overlap
- Reduce duplication
- Categorized by product not geography
- As an RTMO, Bay of Fundy and Valley is too large a region. Split that into two for a total of 4 regions vs. 3
- Clarification of roles
- ROAs vs. municipalities vs. TAs
- Define regions
- More municipal buy-in if regional delegates are equally represented
- How will it differ from previous model
- If regional representation is divided in 3 there may be more opportunity for a more concerted effort
- It is heavily administration focused – shouldn't be

-
- Action driven instead
 - Streamline municipal, NSTA, industry (clear roles and partnerships)
 - South Shore is too big (begins at Chester)
 - Story – brand of the regions. Experience description
 - Coordinate (professional)
 - No!
 - Review boundaries i.e. Fundy/Annapolis
 - Incorporate tourism into REN model
 - Industry led board
 - Take the lead on product development (major events)
 - Not a preferred option
 - Central organization with regional representation
 - Joint approval of festivals/events needed by province and region
 - Region review
 - Build in flexibility for cross-regional partnership
 - Thematic based division
 - Valley & Fundy Shore region too big. Get back to a Valley region (or so). We can still have a Fundy promotional project by cooperating with another region
 - How do we deal with matching commercial dollars in high population areas?
 - VIC should be a resource to move people – standards
 - Boundary changes, elimination?
 - Better definition of region
 - Fairness in marketing
 - Need a regional contact
 - Reducing size of Annapolis Valley/Bay of Fundy region (6 plus hours to travel from tip to tip)
-

Option B: Shared Leadership with NSTA Led Marketing

Option B: Shared Leadership with NSTA Led Marketing

Challenges

- Government doesn't know the area like the locals know the area
- Govt is less efficient than private industry
- Do we lose input/control?
- Should this not be industry driven?
- Equitable marketing
- Inconsistent marketing
- Pigeon holing regions
- Municipal funding loss
- Messages connect at grass root level
- Inconsistent across the province (other regions doing own thing); May be a missed opportunity to do more
- Determination of budget levels
- Ensuring regional input for marketing and relationships (buy in)
- Lack of control – hard to change
- Funding issue (potential) if the stakeholders think the NSTA is involved would they disappear
- Who would bring the \$ together
- No local \$ participation
- Less input, local knowledge, personal contact – top down management
- Approval/permission/limitations from NSTA – certain regions may not feel properly represented if NSTA has a controlling interest
- Will NSTA have presence in region?
- Would each area have input into marketing
- Scheduling for projects
- Autonomy goes back to NSTA (decision making)
- Administrative costs (\$) reduce marketing \$
- No input from industry
- Make sure the “little guys” don't get lost and they are included in itinerary (opportunities)
- Deciding the promotional focus
- Getting the Province to change their minds (what to promote)
- Representation equal/marketing opportunity?
- Lose South Shore marketing direction/hands-on
- \$ from industry limited
- Cooperative marketing partnerships – option available?
- Tourism very small part of REN
- Rural Nova Scotia needs a bigger voice
- Funding scale needs equalization
- Loss of control of marketing campaigns unless developed on collaborative basis with NSTA

- NSTA would not now which festivals and events to approve
- Portray cultural sensitivities
- Who's controlling it?
- Come live the different experiences/cultures
- Smaller and less developed attractions will be lost
- Knowledge base of product
- Lack interest
- Get lost (again!)
- Municipal and regional buy-in
- Identifying "best of" experiences/products for marketing campaigns
- Buy-in
- Same challenges with option A
- Large regions – diluted
- Not enough funding
- Message diluted
- Lack of staff expertise
- \$
- Goes against Ivany Report – need less government control. This leaves all marketing with government with government to leverage \$
- Little municipal \$ they are investing in REN and their own tourism staff
- How can small organizations work? Get lost?
- Too much focus on 5 key areas: Lunenburg, Cabot Trail, Halifax, Bay of Fundy, Peggy's Cove – everything else gets lost on novascotia.com
- Geographic breakdown cannibalizes regions
- Leadership is key!
- Need a clear vision with specific priority
- How do we measure success?
- Funding and timing – 2015 planning
- Will the marketing be effective?
- Industry voice
- Need middle party (REN?)
- Picking top 10 (not fair)
- Loss of small marketing efforts – identity
- Understanding uniqueness of each region
- NSTA mandate and responsibility
- Same challenges
- Communication between each region and NSTA and understanding
- Confusion of responsibilities to tourism operators
- Governance fairness/equity (province vs. municipal)
- Keeping on the same page
- Build public awareness of Tourism to NS
- Too many voices bogging down decision making
- Weak leadership (Province, NSTA, local)

- Onus falls to municipal and industry in local area
- Communication from top down (that everyone is connected)
- Message too generic
- That enough input provided by each region
- Communication timeliness
- Regionally focused vs. visitor focused
- NSTA lead may not agree with region
- This region will get lost in the shuffle
- Marketing dollars will go to Hfx & CB
- Volunteer fatigue within tourist attractions
- Same as Option A
- Communication
- Reduced marketing presence
- Losing your regional identity
- Potential disagreement over priorities
- Fear of loss of individual identity e.g. Loss of bilingual content
- Restricted timeframe to update website
- Lack of alignment between regional priorities and what the province sees as a market with potential growth
- Potential loss of regional voice over how regional monies get spent
- 3 regional organizations to agree to NSTA marketing lead
- Clare district not in current YASTA model
- Would a “centralized” marketing campaign take away creativity from smaller regions?
- Can we create good regional content/stories?
- Still admin triplication
- Regional identity loss
- VIC: same
- Keep content up to date
- How to ensure industry buy-in or voice is heard of marketing
- Risk of off-shoot groups if not satisfied
- Breaking down the thought that everyone is a “marketer”
- Each region thinks they need to focus on their own interests instead of the whole SW
- Convincing everyone to lead with the “best” not everything
- Local feel diminished
- Output may differ from input
- Less industry buy-in
- Too many levels – regional bodies administering to province
- Dilution – more effort may be put into an area vs. another
- How to ensure local industry information is not lost in the bigger provincial marketing
- Leaves more decisions in provincial hands about what the icons and marketing opportunities area

	<ul style="list-style-type: none"> • Have to somehow ensure the local content is fed in – is it up to the DMOs? • Regions are unable to promote themselves, in competition for the NS visitor dollars • NS.com customer versus industry • NSTA not aware of problems at the local level • Too small to provide local funding • Long-term funding • Listening to regional input • Timely input by provider • Too many websites
Option B: Shared Leadership with NSTA Led Marketing Strengths	<ul style="list-style-type: none"> • NSTA works more closely with industry/other organizations – may be easier to leverage buy in • Marketing more consistent • Less overlap • Consistency to the consumer • Building experiential itineraries • Better quality marketing • Govt taking the lead • NSTA/Govt get people here – industry create the experience • Could align campaign with strategy (reducing duplication and people) • More cost efficient • Increase value for \$ • Smaller regions can focus development and increase capacity at the regional levels • Economies of scale • Available expertise • Potential to increase audience • Consistency in messaging • Staff vs. volunteers • Consistency, better flow and fit with provincial marketing • One Nova Scotia • Better timeliness because resources would be in place • Accountability • Opportunity to learn from RTAs • More buying power • More expertise • Better technology • A more professional, streamlined • Regions request assistance for websites, collateral, strategies, general resources • NSTA has ability to drive to one source novascotia.com • Why/what are positive models from other regions, what are they doing that is working well, what isn't?

-
- Available resources from NSTA (expertise)
 - Reduce cost and efforts
 - Better alignment with provincial marketing
 - Enhanced regional presence on novascotia.com
 - One Nova Scotia
 - Market driven
 - More visitor/user friendly
 - Communication strengthened with NSTA
 - Puts us “in line” with Provincial strategy
 - Easier access to funding
 - Only novascotia.com
 - Stronger marketing
 - Website driven by NSTA
 - Traffic
 - Less duplication
 - Less \$\$ spent
 - One website for visitors
 - Market driven
 - Less duplication
 - Everyone granted same access to funding (level playing field)
 - No question of who’s doing what – accountability
 - Voice direct to decision makers and funding allocation
 - Provincial website represents a broader picture of available experiences
 - More relevant
 - Content for visitors
 - Brand consistency
 - Talking with 1 voice (marketing led by NSTA) less costly and less duplication
 - Better buy-in
 - Branding as NS
 - One-time fee – marketing
 - Better knowledge of region
 - Great to have website that can be searched many ways
 - Great to focus on ns.com
 - We are too small to fragment
 - Love ns.com
 - Better expertise of NSTA for web
 - Most cost effective, but is it most effective
 - Can set analytics to document success
 - Group on ground would recommend (but might get shot down)
 - Benefit to have smaller groups feeding ns.com
 - Consistent look and feel – novascotia.com has to be the hub instead of providing visitor with 10 different websites (trying to market)
-

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- Roger Brooks has better model than Ivany – focus on experiential – pick top 10 – always someone will be left out but the more people you get to one area, the more an area grows
 - This option actually gives more opportunity to small groups on ns.com
 - Can't market small websites anyway – too \$
 - Focus on product pockets
 - Villages of venue – Lunenburg Academy of Arts – target passions of visitors
 - Oversight and audited – accountability (both funding and results)
 - Concentrated effort
 - Singular website
 - Marketing expertise (province)
 - Strong website and connection
 - Direct visitor contact
 - Can cluster experiences
 - Coordinated effort (provincial and local)
 - Expertise (e.g. Marketing) available
 - Coordination – marketing leadership
 - One portal website lowers “false geography”
 - Takes advantage of NSTA expertise especially marketing
 - Volume buying – economies of scale
 - Cost effective (more bang for the buck)
 - One portal (website)
 - More collaboration
 - Consistent message – to brand Nova Scotia throughout
 - Dollars go further as marketing dollars spent by NSTA
 - One website for tourist
 - Regional and product representation visible to the potential visitor
 - On the ground representation servicing the visitor
 - NSTA marketing expertise
 - More bang for marketing \$\$
 - Consistency with messaging
 - Coordinated marketing
 - Cheaper
 - Marketing based on experiences not borders
 - Time/money saved on website development
 - Increased website traffic (draws people to NS first, then to each region)
 - Province has research/staff/facilities region can access
 - Allows regions to tap into greater expertise and assets that exist at a provincial level
 - Better coordination for marketing province as a whole
 - One unified NS presented to the world
-

- Allows local organizations to focus their marketing dollars on regional programs instead of funding larger out of province activities
- Streamlines communication (if NSTA plays a facilitation role) to bring regional voices to the table
- NSTA marketing lead – expertise, statistics and skillset required
- Consistency
- More money for funding if administration costs reduced
- Centre of excellence
- Novascotia.com – professional
- Same branding throughout
- Simplicity
- NS.com is established
- Access to NSTA resources
- Reduce duplication
- Professionals doing the marketing
- More ROI on funding
- More opportunity for tourist flow between regions
- Breaks down barriers
- Leading with your “best”
- Expense would be with NSTA
- Unified web presence and internet marketing
- Eases competition between regions; promotes the whole – rising tide raises all ships
- Much better exposure together
- Most efficient use of administration funds
- Creates an opportunity to review the top 25 icons to become more relevant to 2015 travellers
- NSTA does the marketing
- Professionally trained to identify and market our products

**Option B: Shared
Leadership with
NSTA Led Marketing**

Funding Model

- Corporate \$
- Municipal units rely on provincial
- Municipal units are going to go if local orgs going to do it alone
- Money saved from municipal perspective if concerted approach via NSTA is taken with websites, regional guides etc. All is available in Doers & Dreamers
- Municipal, provincial and industry
- NSTA funding and leading marketing means less admin costs
- Clear model for where \$ goes
- Not membership based
- Regional effort (staff etc.) to be funded by Province
- Marketing – pay to play
- Municipal
- Industry
- Levy

- Needs to be jointly funded
- 50/50 important
- Only one entity to fund vs. multiple options
- Models for difference, industries to qualify for \$ co-op marketing
- Small community efforts self-fund
- Increase provincial funding to NSTA
- Flexible approach to funding
- Inclusion of a “levy” from industry
- Similar to A shared between municipal/province/industry
- Pay to play/opt in selections
- Each area around province receives the same money (budget) not based on population but territory
- Equal contribution from municipalities
- Booking online via ns.com pay per services
- Municipal/provincial/industry
- Membership \$
- Investment return
- Municipal
- Stakeholders
- Pay to play
- Frees up local money for specific regional priorities
- Municipal provides core funding
- Province and private business and non-profit groups split marketing, development and events funding
- Leverage project \$
- Still difficult
- Need to have municipalities (formula)
- Core funding NSTA (?) 50 – 25¢ dollars based on municipal funding
- Matched funding but how to ensure equality
- Less membership funding/mostly admin funding
- Advertising and industry partnerships
- Member based with guaranteed marketing

Option B: Shared Leadership with NSTA Led Marketing

Recommended Changes

- Industry driven/influence on marketing
- Industry needs to be responsible for “selling” their experiences & advising
- Industry are talking directly to visitors – can influence their plans to extend their stay
- Keep NE area with Central
- Possibility to have NSATA presence in each region
- Coordinate marketing plans
- Move/budget save/take over mgmt. of VIC instead?
- Streamlining
- No/low admin fees from funding
- AVCC test model in other regions

-
- Less \$ toward admin & more toward tourism initiatives
 - One stop shopping – one website for all
 - Festival and event funding approved locally
 - Representative from each town/municipality with strong tourism background as a resource person
 - Industry led board
 - Review the boundaries
 - Adopt Ivany Report mindset – if we all work together we all win
 - Define “assist” – clarify responsibility
 - More focus on return visitor
 - Good model “doable”
 - Experience base
 - Survey visitor to see what they want
 - Regional input/representation within marketing
 - Some input from regions in marketing
 - Want regional input on events funding decisions
 - Recognition of Acadian identity
 - A & B look a lot alike
 - Region areas feed “plan” – NSTA to execute
 - Making sure aligns with provincial strategy
 - No or minimal funding for marketing outside of the NSTA plan
 - Ensure equitable representation based on leading but with your “best”
 - Very little opportunity for industry buy-in
 - Establish a sub-committee that ensure NSTA connection with the regions on development of marketing initiatives
 - Marketing rural NS over HRM/Cape Breton
 - Uniform marketing
-

Option C: NSTA Tourism Management Approach

Option C: NSTA Tourism Management Approach

Challenges

- Sustainability of administration applying for NSTA resources
- How do we make sure each region understands how best to apply/position themselves
- Local know-how – people need to know how to present their case
- Loss of identity and control
- Creates fear
- No industry input
- Industry going rogue
- Feeling of under-represented
- Lack of local knowledge
- Less partnering/mentoring/employment
- VICs gone
- Big properties will own
- Lack of local representation
- Lack of industry influence
- Industry loses confidence/sense of power
- Too susceptible to political power/influence/change
- Buy in from regions
- Decrease in communication
- All rasp to NSTA – probable the bar would be set higher
- Flies in the face of local engagement and ownership (Ivany Report)
- Premier stresses “local industry engagement and leadership” – this is not!
- Out of touch with region’s desire
- Lack of specific local expertise and knowledge
- Duplication by smaller guerilla groups
- Less input from industry
- Difficult to forecast
- More money goes to admin
- Understanding the local area
- Strain on volunteers
- More vocal groups get more attention
- Smaller the area, smaller voice – could be non-existent
- Inequality re: access
- Criteria?
- \$ for partnership
- Applicant – private sector or non-profit
- Time required – volunteers
- Municipal boundaries

- Too little to be heard
- Some VICs would close with no funding
- This is how we currently work and it doesn't work!
- Population based
- Strength in numbers
- Ensuring it is not too admin heavy
- Regional representation lost
- Same old bureaucracy
- What is the funding? Criteria?
- Too much for one organization to handle (if all NS goes this way)
- Small operators and communities could be lost
- F&E funding – lack of local knowledge/big guys will get it all
- Smaller areas with less \$\$ get lost
- A lot of work for NSTA
- A lot of duplication in funding requests
- Those that have \$\$ may benefit more over those that don't
- Less regional meetings/training to local areas
- Regions voice getting lost
- No dedicated staff
- Reduced/limited core support from NSTA
- No level playing field amongst VICs
- Who will develop proposals without local staff “nightmare”
- Increased fragmentation and duplication
- Lack of coordination
- NSTA capacity to manage applications
- Volunteer fatigue
- Dilutes NS brand
- Best bang for the buck with limited dollars
- Fragmentation
- Community buy-in
- Getting the word out there
- Some areas may miss out if business community/regional group are not strong enough
- Multiple masters
- No provincial standards? Pay?
- Fragmented/splinters
- Bad! Lack of strategy, continuity
- No one exists alone
- Need to plan funding and festivals and events in advance
- Local municipalities/regional not funding F&E
- Model needs to reduce competition by groups for funding
- Need to look at local map model like Bluenose Coast map
- Just don't like this option!

- Larger groups have advantage in writing grants \$ talks/50% dollars
- Industry buy-in
- Little continuity
- Little guy gets lost (squished) can't write business case
- Spend too much time fundraising and less time focused on business
- Endless nightmare of fundraising (no time doing – it's hard)
- Top down not bottom up criteria
- Product suffers
- Timing of grants
- Towns run grants too – too late, always
- Need to know in November but don't know if grants are awarded until May – too late visits already planned
- Highly competitive for funding
- Lessens advocacy
- Lack of collaboration
- Buy-in from industry and municipalities
- Local voice
- Funding
- Industry buy-in
- AKA 'anarchy'
- Small business lost
- Larger areas winners
- Fighting communities
- Fragmented
- Lack of coordination/communication
- Don't do it!!
- Disaster
- Disagreement between municipal/regional groups
- No economy of scale
- Mayhem
- Inconsistent, fragmented message
- No branding
- Fund raising
- Identity
- Lack of marketing for regions
- Confusion
- Major pushback for all operators
- Loss local voice
- Overcoming fear of losing control
- Lack of priority status for YAS
- Does not foster brand identity in YAS; potential loss of current cohesiveness
- Access to decision-making: decision made centrally (cancelling ferry!) can have massive regional impact

- Duplication
- Squeaky wheel gets the grease – Hex & CB
- Some area will have local tourism orgs, others won't
- Too large a scope for NSTA to manage
- Getting regions to "buy in" (loss of control)
- Wasting time competing against each other for funding
- Probably have less community buy-in
- Lack of communication within and across municipalities
- Would likely increase duplication instead of decreasing it
- What happens to regional voice when there's no clear entity identified to elevate regional product and experiences
- People will have to spend more time lobbying for funding
- Lack of regional focus
- Lack of volunteer- burnout
- Potential lack of knowledge base
- Fragmented marketing HUGE (different brands)
- Lack of capacity to facilitate projects
- Lack of accountability – who is in charge?
- Who will do the work?
- What ends up as the brand?
- This model does not encourage creative thinking at the local level – no staff to do business case proposals
- Capacity issues
- Communication challenges
- Raising revenue
- Political pressure for event funding and marketing initiatives
- Keep politics at arms length
- No strategic message
- No product development
- Industry may be forgotten
- Risk that there is no champion at regional level
- How do local regions fund coordinated tourism effort
- Industry could be more fractured or competitive for project funding
- Is there capacity at NSTA to take this on
- Danger that provincial funding gets reduced with the new model. Will government see this as a way to cut costs
- Will rural areas lose ground based on population in big decisions i.e. HRM carries far bigger weight (related to population and also industry investment available)
- Limited dollars in small areas and everybody wants a piece of it
- As project based funding where do we get the share of our dollars
- There is no referee or coordinating body in the region
- We do not want it all to go to one town
- What organizations can apply

	<ul style="list-style-type: none"> • What is an organization • Many organizations do not have the skill sets to plan events or topics • Niche markets • Local input lost? (Say in the area) • Good ideas lost because lack of expertise • Generalized marketing regional flavor could be diluted
Option C: NSTA Tourism Management Approach	<ul style="list-style-type: none"> • One resource, one office to assist with munic/reg questions; simplified approach • Consistency, better accountability for \$ • Consistent marketing for all regions • Better opportunity for small communities
Strengths	<ul style="list-style-type: none"> • Cohesive marketing – big picture • Regional VICs only • Big properties will own • Purchasing power/save admin cost • Sole point of contact • Consistency • Cost savings • Decrease duplication • Better positioned – skills • Reduces duplication • Expertise – consistency • Lack of specific local expertise/knowledge • Industry directed experiential marketing • Increase the overall offering from funding (less admin, more investment) • Costs • Traffic that NSTA gets • Not vulnerable to regional organization collapse • Not reliant on municipal support • Market driven • Collaboration • You make the effort, you get the reward • Less government the better • Least coordination amongst business owners • Avoids another org to administer • Use of “InTouch” to communicate • Encourage groups to collaborate and create protects/product • More knowledge • More options for funding to smaller areas • Eliminating a channel – go through NSTA directly • More efficient • Advocacy

-
- Best practices development – not reinventing the wheel
 - Expertise development to monitor energy – visitor trends, needs etc.
 - Ability to proactively plan to address same
 - More money to programs than to administration however NSTA may need more staff that would counter balance this strength
 - Increased individuality
 - Community led approach
 - Government direct to grass roots
 - Flexibility for those with local knowledge
 - Projects not defined by “region”
 - Positive allocation to project based initiatives (business case)
 - Unified branding (One Nova Scotia)
 - Clarity of decision making/responsibility ‘who to ask’
 - Pitch your own project
 - Client driven vs. product driven strategies
 - Identifying the market
 - Brand/marketing focus
 - Joint marketing
 - None
 - One voice
 - Visitor focused
 - Opportunity
 - Niche/experiential marketing opportunities
 - Experience based marketing
 - Tap into NSTA expertise
 - Eliminates wasted money and reduces duplication
 - Creates uniformity
 - Accountability
 - NA
 - Consistency with NSTA overseeing whole province
 - Strength in marketing the whole province instead of regions with arbitrary names
 - Eliminate borders
 - More resources to “FOCUS” on tourism events & promotions
 - Lessen administrative tasks
 - Being forced to operate on a provincial level (i.e. TIANS instead of a local tourism group) might increase knowledge transfer across local businesses
 - May leave more dollars for projects and development on a local level
 - Access to product development funding
 - Less focus on region more on experience
 - SWN has the icons to brand as local attractions
 - If you can get your act together, you can do well under this option
 - Eliminates arbitrary boundaries
-

- Low administration costs – more marketing \$ more project \$
- Flexible system allows thematic cooperation
- Empty slate for collaboration
- Can apply for projects based on themes, interests and other non-geographical considerations
- Success happens on strengths of partnerships which fosters cooperation
- Less administration – more for projects
- Still have local tourism
- Put a tourism officer in each REN
- We may get more ideas
- Continuity
- Municipalities not having to fund organization
- Good ideas not being lost
- Consistent marketing
- Consolidated admin
- Coordinated/centralized services
- Improved VIC model – more consistent

**Option C: NSTA
Tourism
Management
Approach**

Funding Model

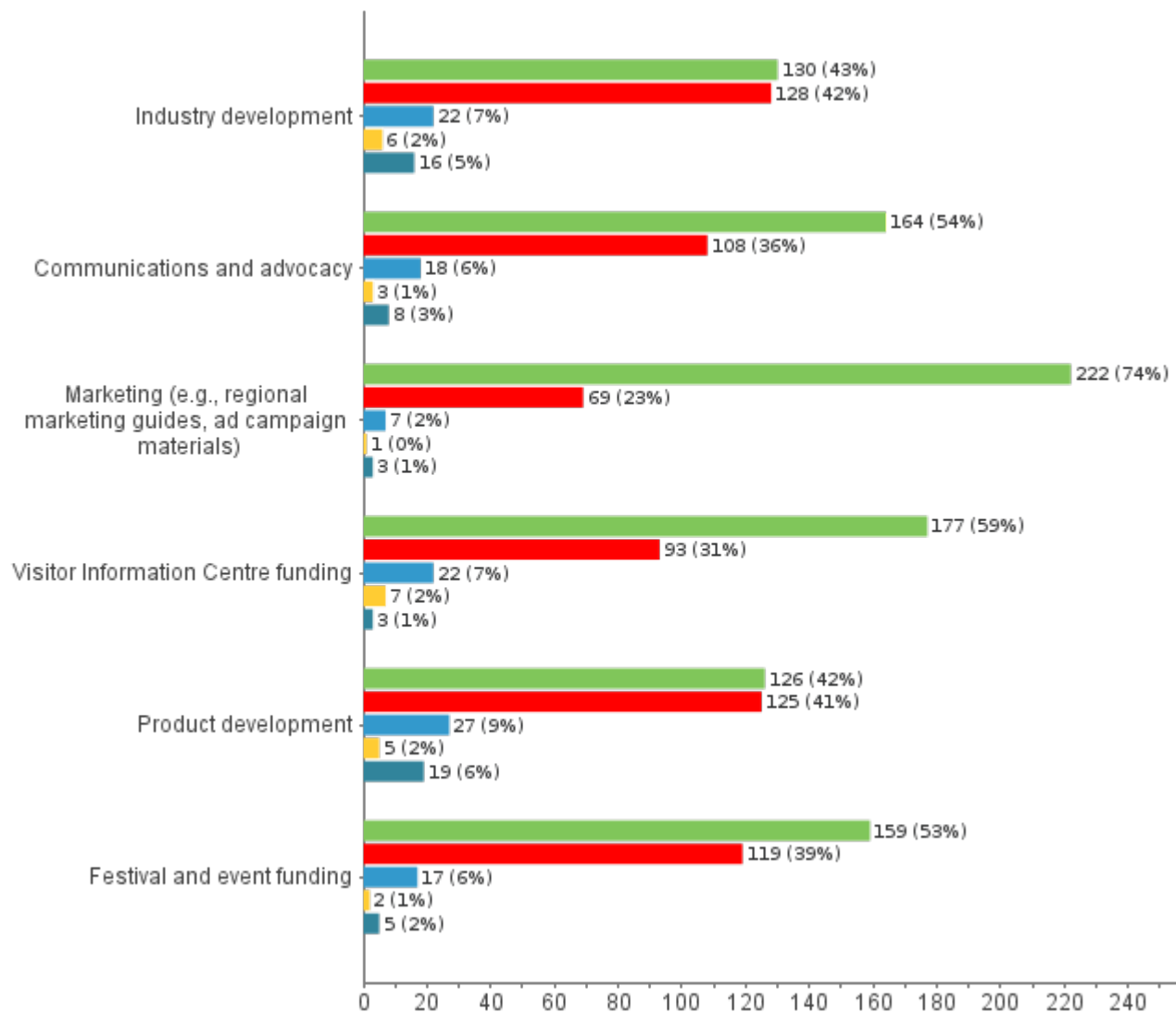
- Direct all \$ to NSTA for allotment to regions based on need, criteria, projects
- Little opportunity for industry/municipal funding
- Open to provincial budget cuts
- No other government participation
- Taxes
- 50%
- Just because you apply doesn't mean acceptance
- No middle man means less admin \$ spent
- More money on tourism initiatives directly
- Different funding pots for different sizes
- Reinvest a significant amount of tourism revenues
- First come/first serve?
- Little guy left out
- How do you equalize funding opportunities
- Application based – accessible to all
- Project driven
- 0
- Less strain on local government
- Spending model not yet defined. Who determines it?
- Easy – just provincial \$\$
- Money contained within community
- Provide funds mostly everything (core. marketing)
- Need core funding NSTA w/ municipal buy-in (\$)
- How does the municipality buy in to this model?
- No funding from municipal units? Not acceptable

	<ul style="list-style-type: none"> • IS there a financial incentive for volunteers to do the business cases? • All NSTA • Municipalities/industry would have to fund any local efforts • How do we fund an RTIA to do just the VIC funding • How does extra staffing at NSTA get funded • A mess/unwieldy • Formula may need to be flexible based on scope vs. 50/50 • Funds saved by this model goes back into programs
Option C: NSTA Tourism Management Approach Recommended Changes	<ul style="list-style-type: none"> • Maybe? • Get industry support • Roles need to be better clarified • Who is responsible for what? • Could one “big” event jumpstart our industry e.g. Crocodile Dundee movie for Australia • Accountability from NSTA to each region • Need for a regional office with 60 minutes • Ensure industry and individual operators have input (representative) • Local contact person • More collaboration among government departments • More project money and more support • Have an NSTA program officer in each area • Have a local tourism administrator • Fund industry not individuals • Who responsible for evaluation • Target Air BNB and take a stand to the world to support small business • 0 • Not in favour • Better organization • Unknown approach going forward needs clarification to preserve regions tourism interests • Whole province needs to be marketed, instead of just promoting CB & Peggy’s Cove • Model would work but must have regional advisory representation • Central focus of the marketing (one brand) • We do not know how to change this model – do not think it works at this table • Could TIANS or an existing organization be the keeper/administration of the VIC program for the region (it seems silly to invent a new RTIA to only look after VIC funding) • Thematic groups (advisory) • Infrastructure in place for local support • Staff person assigned to specific areas for contact • Ensure mechanism in place to address regional concerns/complaints

Appendix C – Survey Results

Southwest Nova Scotia Input Process

Please indicate how important each of the following are to support tourism industry growth in the region.



Please identify any other functions you consider to be critically important to support tourism industry growth in the region. Please be as specific as possible.

#	Response
1.	- offering training of regional reps thru TIANS and encouraging membership to TIANS - having an employee(s) at NSTA being able to answer questions by phone or email on the various regions (i.e. a dedicated NSTA phone line for regional queries only)
2.	Its important to have the province fund regional DMO's who demonstrate the ability to market and promote their regions. Tourism should have a regional approach the same as economic development.
3.	Thematically-based partnering and packaging
4.	Lobby government to keep historic sites, parks etc open into shoulder season. They could reduce staff, but stay open to support local restaurants, shops, BnBs etc. Also recognize that a lot of museum visits could be evening events after a day of travel, and lobby to keep museums open until 6 or 7.
5.	Unlike most other regions, ferries are very important to SW Nova. The regions they serve need to be recognised in promotion and marketing.
6.	A liaison co-ordinator to provide pre-arrival and Front-line Visitor Information Counselling to meet cruise ship arrivals in all NS ports of call as well as at any large event where there are out of province participants that meet target demographics.
7.	The dept of tourism must gain back creditability from the industry ; must acknowledge the decline of Tourism infracture in rural S W N S as well as the decline in visitation; eg accommodation demand in 1989 in Yar County - 97,506 ; by 1996 it was down to 70,600. Critically important is a goal of sustainability for the private seasonal operator . There are many changes needed and not back to the past
8.	Expert assistance to product providers who do not know how to help themselves.
9.	funding to help pay interpreters for new experiences until they can come self sustainable on there on, its takes at least a couple of seasons to grow them to that point.
10.	All are important and part of the whole that is relevant to the industry.
11.	Festivals , events that are related to Nova Scotia's historical importance in the founding of Canada and North America and product development that are related to Nova Scotia's prestige unspoiled natural beauty and you can be one within nature's tranquility.
12.	Marketing Nova Scotia all over the eastern USA at trade shows, festivals and events.
13.	Ensuring that municipal units work together. There are five units in Shelburne County... They need to work hand in hand so tourists linger longer in the area.
14.	Business and industry working together
15.	Grants to support entrepreneurial tourism initiatives.
16.	Efforts should be made to ensure accommodation providers are aware of the tourism experiences available in a region. At the session I attended the accommodation providers

	were not aware of many of the tourism experiences available.
17.	More financial support for events/festivals that have a proven track record and are looking to grow. Simplify funding applications for significant and successful events.
18.	The industry has no idea how to compete to draw tourist money in. Most of the industry still relies on our natural beauty to draw tourist instead of creative fun ways to bring in new dollars like Wharf Rat.
19.	partnerships
20.	It is important that everyone is given the tools to be successful when developing products for the tourism market.
21.	NSTA to support a more inclusive approach to regional input, development and activities.
22.	to help Tourism groups, promoting a region or area, become sustainable.
23.	My strength is major events and the numbers of visitors they attract. Although specific experiences such as culinary, kayaking, etc. is an important profile to attract, from my experience, the actual numbers these targeted experiences have shown are low compared to overall. The participants and non-participants alike attending major events, visit the area out of necessity but always become tourists in the purest sense. They are also more inclined to return to an area to spend time as tourists.
24.	Nova Scotia and each of the individual regions have a ton of product and there is always the potential to develop more new product. However, this can be done as a secondary function as we already have a lot of good product. The most important function for the province and each individual region is to get the message out and into the market place of who we are, where we are and why "they" should come. Without visitors, there is no need to worry about visitor info funding, or festival and event funding, etc. WE HAVE TO GET THE PEOPLE HERE!
25.	Strategic marketing partnerships e.g. those are will encourage visitors to travel around the region. One example is the SWNS Acadian Passport.
26.	More, and more easily available, World Host training for staff.
27.	Accessing accurate evidence based data to evaluate your demographics , markets, successes and failures
28.	Highway signage like they have in PEI that is either very affordable or free.
29.	nil
30.	It is not about regions. It is about bringing more people to Nova Scotia and the sooner the "protection" mentality is changed the better for tourism as a whole.
31.	The main thing remains the Ferry to St John New Brunswick and the one to Portland Maine
32.	Good information for the visitors likely smart phone format but obviously need printed for the older people
33.	Keep the ferry more non-stop or direct flight from europe
34.	Educate the locals as to the importance of tourism and how they can be part of the benefits.

35.	We are in Mahone Bay and run a B&B. The frustrating thing we have experienced is how so many things shut down as Thanksgiving is completed - even though the weather is usually still quite good for the balance of October. We believe businesses are missing out on revenue opportunities but shutting down so early.
36.	1. identify and maintain tourist sites ie: lighthouses, public beaches 2. increases public beach areas
37.	get a new ferry not a cruise ship.
38.	Funding and festival funding
39.	Maintain Portland-Yarmouth Ferry Service Advertise Halifax Events during Tourist season especially. And events at all locations of our Tourist areas. So much is happening and everyone needs to know it--visitors and others. This needs to be advertised in January and include with all tourism ads.
40.	Please do not encourage smaller TIAs in Western NS. Been there done than. Need strong regional voice.
41.	Highway and road maintenance/upgrades. Signage on 100 and 200 series highways with coordinated signage plan.
42.	Partnerships between the industry, municipal and provincial government
43.	Product development of what?
44.	I gather that Booking.com is an American company? Why is it that we cannot have a NS based booking system that works and that does not cost so much for the property owner?
45.	year round tourism - not just summer and fall
46.	Support for small, local businesses. Picturesque scenery alone isn't enough to encourage repeat visitors to the province. Rural areas need more attractions and destination activities.
47.	Road repair is critical to travellers bad roads mean less travelling. Adequate signage in specific areas (tide reminders etc) Staff all of your provincial parks with trained staff knowledgeable about the specific area they service. Welcome centres with bookings.com has diminished contact with actual business owners to almost nil. and should be revisited
48.	Strongly support icon attractions and their supporting activities. Focus on what we have as product and make it better.
49.	marketing specific to Nova Scotia Scotians who travel throughout the province. As a Visitor Information Centre manager, I know this makes up the largest portion of travellers
50.	Shoulder season initiatives and incentives
51.	Opportunity Assessment... what areas can we grow that already exist and what areas can we develop that currently don't exist or are in an early stage.
52.	I feel it is critical to identify strengths and to support/reinforce organically grown events/destinations/brands. Support community ventures, reinforce destinations areas that are already branded ie. reinforce "South Shore" versus 'Bluenose Coast'. Put money into existing events rather than new salaries.

53.	A focus on culture in all marketing, including contemporary cultural offerings.
54.	Signage issues are full of red tape in Kings County NS. Also TransCanada signage is very expensive for smaller sites. Please emphasis the importance of heritage and heritage sites!
55.	NSCC (or perhaps NSTA or TIANNS)course to train and inform front line workers who interact with the visitors. The Chambers of Commerce/Boards of Trade could encourage their member businesses to send employees to this course, and it should be made available to students who will be working in the service industry or in such places as parks and museums.
56.	I think the advertising should be more geared towards the European market where they get 5 to 6 weeks vacation per year and enjoy the outdoors in Nova Scotia. Nova Scotia is is mostly Wilderness and and we need to exemplify this. I feel like Marketing Guides like the Doers and Dreamers need to be scaled back as more and more is done online.
57.	I am concerned about the designation of Nova Scotia Icons. Of the 25 there are attractions in SW Nova that are not listed but which are more highly ranked NS attractions by TripAdvisor. I believe that this list needs to be updated to reflect the current interests of the travellers to Nova Scotia.
58.	I think it is difficult to say one is more important than the other - if you put focus on one area (or a couple) and not the others those will soon become the ones needing attention - I don't think one is more important than the other - they all need to maintained consistently.
59.	I take industry to mean the "sector" as in building things/production, etc. because there has been a conversation in my area linking the two. The "Tourism Industry" in Nova Scotia certainly has to put more effort into DE-CENTRALIZING it's focus as I believe someone told me that 80 odd percent of the travelling public coming in to NS through "Halifax" go directly to the countryside. A good case for infrastructure support (highway improvements, amenities:gas stations, places to eat with toilets!!!, banking, small business development and advocacy, rest stops, etc.)
60.	Funding
61.	strongly favour partnering funding for marketing & product development with individual private businesses as was done in in this fiscal year
62.	Place the focus on ALL of Nova Scotia, not the usual Peggy's Cove, Lunenburg, Fortress Louisburg in Cape Breton, the Ferry did not help our campground business, and the 26 million spent on it gave a very poor return, wake up to reality, and quit pouring funds into special interest groups that give a poor return.;
63.	Entrepreneurs/businesses need to be supported and encouraged, not with \$ but positive attitudes and helpful advice. Far too often an entrepreneur is told why they cant do something as opposed to what needs to happen and where to find information to make it possible. Dollars and secondary to good advice and positive attitudes.
64.	communications between existing entities
65.	Better roads for them to reach us and upkeep of scenic area roads (I think of Cape D'Or and Cape Chignecto's West Advocate road and roads leading to Eatonville. Better and more signage both on the Joggins end and Parrsboro. Awareness of Visitor Information Staff of what the area is like and what is available- this should also be passed along to

	businesses (so when someone asks "what is available in Advocate - they don't CONTINUE to say 'oh, there's nothing down there'!!
66.	Events that can be linked together to create longer stays in an area
67.	1. The Wolfville Tourist Info Centre is very good at presenting the full range of activities and co-ordinating and linking up visitors with the available accommodation in the valley, a win-win situation. 2. We have just relocated from Quebec and taken over a B&B near Wolfville and can report that the TV ads on Newfoundland and Nova Scotia that were shown in Quebec recently were extremely effective and triggered a lot of discussion.
68.	Excellent provincial highway signage is critical. We don't have that now. Also, some regional training seminars for wait staff would help.
69.	To remain OPEN -- stores and restaurants especially. We cannot service our tourists if we lock our doors at 5:00pm. The need for better service from all front line persons..
70.	hands on outdoor/indoor experience workshops
71.	Attractions before Canada Day and after Labour Day only open 5 days a week (closed Sunday and Mondays). The fall is becoming so strong we need our attraction to be open daily. People coming are upset and disappointed. Why do we want to kill a blossoming market opportunity? The fall colours are best the 2nd and 3 weeks of October, but nothing is open in rural area's. We need funding to keep this open and markets to bring people here well into October. We are near Digby and the historic sites that are crucial are Port Royal and Fort Anne in Annapolis Royal. Fort Anne closed the end of September. Many very disappointed people and we as accommodation owners are frustrated. We need our attraction + marketing = More visitors, especially in shoulder season. We need to extend our season! My idea of closure times for the season should be October 31st, 2 weeks later than October 15th. Its a starting point. The other is ferry schedules and availability. It will take time to get people acquainted with the Nova Star after no ferry for 4 years. Schedules must be maintained and not shorted. Do you know how many reservations are lost because of ferry companies shortening there season on a dime? Its astounding!
72.	An Economy. Lower taxes. Stuff for tourists to do.
73.	Protecting our woodlands, lakes, rivers and coastline to ensure continued interest from our guests.
74.	Creating a unique product for the area is important to luring global visitors to Nova Scotia and the South Shore. The money granted to South West Nova(half marketing, half product development) was a step in the right direction. More of those kind of projects would be key. Also, small experiential businesses need help to have access to affordable insurance to run their business. And, of course, marketing that product once the products are market ready is important. We also need to have better VIC hours or VIC kiosks so visitors who are already here have a positive experience finding what they came here to see and discovering other activities once they are here. This ease in traveling our area will give us rave reviews when the visitors return home, in theory creating good word of mouth advertising.
75.	Coordination and equal support of directional signage content and placement consistent across the Province in order to promote all municipalities, equally.
76.	more international tour companies promoting tours in Atlantic provinces. I have travelled the world with many different tour companies. All I have to do is type in a country and I

	have many options. Not so much in N. S. Maybe tour Companies will have to be subsidized. The other problem is we are so expensive compared to many other Countries where tourism is increasing in leaps and bounds. These Countries provide new experiences.
77.	Transportation connections to area, other than private motor vehicles.
78.	-Points of entry -Affordable travel -More promotion of Nova Scotia internationally - Increased promotion in US -incentives for longer hours of opening for businesses/attractions
79.	Co-op funding between a credible NGO or government agency and small business works. The problem is there are too many fraud artists in positions of authority within these NGO's and until our value system includes more professional ethics and an alert bureaucracy & elected officials.....the effort is fruitless!
80.	Repair and maintenance of the roads needs to be addressed with the proper authorities. If the tourists can't get to an attraction without worrying about damage to their vehicles, they're not going to visit.
81.	Research and statistics Education and training
82.	It is very important to the Tourism industry to have the Ferry that connects us with the USA. This is essential to the tourism industry.
83.	Information Centers are most important...that is the first thing I look for when travelling.....na d when guest arrive here at our property thye look for materials and we have to go find them ourselves. I have called distribution many times and no response.
84.	Infrastructure such as proper signage and better paved roads are critical. Why target motorcycle riders if the secondary roads are so bad they can't drive them? Another thing would be getting media on board, stop harping about the negatives (gas prices) and start talking about the positives (the ferry brought 60,000 more people in 2014 than would have come without it.
85.	The reinstatement of the Nova Scotia Tourist Accommodation Act is critical. It is critical because the accommodation sector of the tourism industry in the province needs to be regulated. This will ensure standards to protect the health and safety of visitors to our province and limit, if not eliminate the unlicensed accommodation operator and level the playing field. As things stand right now, the industry is be eroded at an alarming rate and the small accommodation operator is being placed in jeopardy.
86.	Public transporting If transport
87.	Marketing in the form of letting people know about NS and what we have to offer - guides are pertinent - but people have to know about NS before they can order guides. Advertising in Europe and across USA and Canada.
88.	the government must stop partnering with on line booking companies
89.	Awareness of opportunities to partner and to market to potential visitors. Awareness of opportunities to include festival and event information in marketing activities at little cost.
90.	education, funding assistance to grow product development
91.	Access to diverse community needs

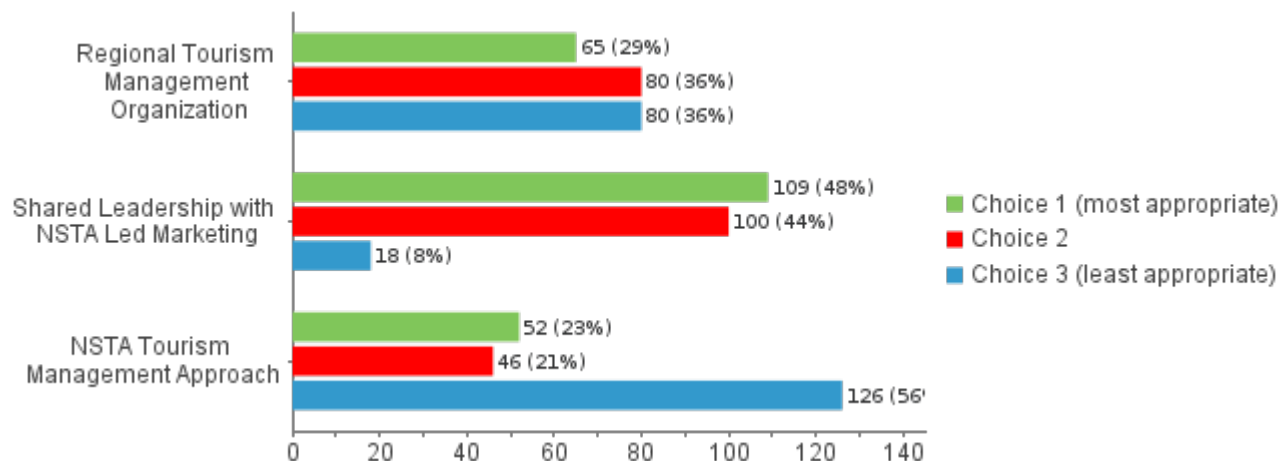
92.	We need to promote South West Nova as being family-oriented, beautiful beaches, gorgeous sunsets. But! We need more higher-end restaurants and touristy things such as an ice cream "boat" on the Belliveau Cove boardwalk. Or a fish and chip stand on the boardwalk. I think this would be a big draw - however, if it was a good draw, there is very little touristy things to keep people interested. The Acadian Festival brings people from all over, so too does the Wharf Rat Rally, but I can't think of any other huge attractions. Perhaps I am missing something.
93.	Workshops to train for exceptional customer service.
94.	I am of the opinion that, MUCH more energy must be deployed towards forming VIC staff towards the History of Nova Scotia and particularly with regards to the Acadian cultural experience. It is fundamental and we are loosing a huge tourism economy opportunity by not doing so. Specific marketing and communication towards this dimension of our destination are badly needed.
95.	Safe, paved, bicycle routes, connected all the way.
96.	Transportation links in timely fashion
97.	Having a dedicated NSTA staff member to focus on a given sector would allow for the development of excellence.
98.	Industry growth marked critical, but not sure what you mean by "industry". I marked this critical if industry means the total stakeholders. Otherwise, not critical. Critical - development of mapping for visitors to cover NS. I.e. 1) Yarmouth boat should have map showing the routes through the Valley with stakeholder stops, b) along the shore, c) Cape Breton visitors - map around the trail with off shoots to different stakeholders; 3) winery trail map, artisan trail map, u-pick map
99.	Maine to Yarmouth ferry!
100.	a longer tourism season, especially Sept and Oct.
101.	modern booking engine system developing; multiply industry negotiations on the matter of air tickets fare for Canadian tourists; raise the question of refund of portion HST to foreign tourists
102.	Good Maps
103.	Industry development: I cannot tell you how many times over the years that my clients have complained about the light house at Peggy's cove closure. We need to attract and retain tourist to visit and spread the word.
104.	One must never forget the importance and the value of the ferry to the USA. It is the lifeline of Nova Scotia. It helps Nova grow and prosper.
105.	The Visitors Information Centres in Liverpool, Shelburne and Yarmouth are most important to WQCCDA
106.	Signage - the province over! Visitors complain constantly about the lack of signage along the Truro to Amherst Shore. No signage for beach access either.
107.	I have a vacation rental. Durring the thigh season 100% of my traffic comes from outside the province. Durring the off season, 75% of my traffic is from within the province. My accommodations are full before summer arrives, so VIC do not benefit me. I am un able to accept walk-in business. People book before they arrive in the province. Festivals do

	because they bring travellers to the area. Out of Home advertising would impact my business more than regional guides. Off season might warrant more regional marketing to encourage locals to be tourists within their own province. I get more and more guests just looking for a weekend away during fall/winter/spring.
108.	This SW area is huge! No one area is more interesting or important than another really, our visitor wants to see it all. For years, Yarmouth has not been measuring up in my opinion, but after watching and working to change that, I realize it is going to take years! I think we have lost our way a bit and we need a bit of help, (not necessarily money) to become all we can be. We are the first impression for many that travel into this Province, and I believe this is a good place for the Tourism department to invest more of their time.
109.	to give more support for the small businesses ,
110.	Maintain ferry services into Nova Scotia through southwest entry.
111.	Highway signage. Website promotion. Television promotion for the area or province.
112.	Allow advertising on the Nova Star and at the Yarmouth Port. We need better road signage also.
113.	Product of Nova Scotia is not really well put together. We need to change some of our standard icons to more current trends to entice new visitors and encourage old ones to return. We need to work together to promote all the regions and the ferry should have more products on board of what Nova Scotia is about for the passengers to enjoy reading on their trip over or have tasters of what they can experience, with food, trips to do and history...and the Taste of Nova Scotia brands offered on board.....
114.	having a boat to link us to US from ns
115.	Strategic planning. The ferry links, but only if they're affordable provincially, and only if they make a significant impact.
116.	Each region should have their own scope of media ads. The ones put out for the south west area of Nova Scotia in 2014 were wonderful but the print regional guides were of little help.
117.	Better signage, development of byway destinations rather than highway travelling, letting tourists know we are not an island and that it is a large province, more words (for us) in the Doers' and Dreamers' Guide; otherwise, why bother? Marketing to OTHER THAN Ontario and New England. These people KNOW where we are. The Southern US does not. More marketing to Europe, where their dollar gets extra CA dollars, which makes is a good deal to come here. Marketing to the VERY HOT Southern US. It's cool in Nova Scotia. Wouldn't that look good on a bill board? Double meaning. Goal: One billboard in each state on Interstates 10 and 20, 40, and 80. Ask for money from accommodations and restaurants and stores to support this project. We ALL want business. The recession appears to be waning in the US. Capitalize on that.
118.	Support for the recreational facilities which many tourists look for when choosing a destination. Local golf courses, for example.
119.	I believe that upcoming events should be Advertised and promoted more for Tourist in the area.Perhaps have an upcoming Event published in some form for all to see ,Tourist and locals.People come to various areas when a special event is advertised and promoted.

120. Develop a better relationship between government and private sector tourism operations.

121. Working with the town(s) - in developing policies to make sure all store fronts (vacant) - in making it possible that they are supported to rental use during the tourist season and not just a 9-5 opening.

Please rank these three options from most appropriate to least appropriate in terms of how regional tourism functions should be managed.



You selected Option A: Regional Tourism Management Organization as your preferred regional tourism partnership model. What is the main reason why you selected this model? Please be as specific as possible.

#	Response
1.	Because I believe in a regional approach to economic development. Tourism is ED and should have the same approach. I know that working regionally in regards to product and experience development has been the best option for our region.
2.	Hopefully less bureaucracy, shorter time frames/ more direct input and answers.
3.	Without organization nothing else will work.
4.	Without local leadership and knowledge, NSTA will not effectively market all areas of Nova Scotia. The icon attractions will continue to be marketed and that is all, there is nothing wrong with doing this on a provincial level however if NSTA were to take over all marketing regional icons would be neglected. Tourism is an economic development activity and economic development opportunities need to be managed on a more local level not just from the provincial level.
5.	I feel that we need a leadership role to filter tourism operators to share marketing opportunities and work together to market our region
6.	Business owners know the best way to drive revenue through the door! They know what they have to do to cut expenses. They understand the importance of communication.

	<p>Therefore, an industry based organization led by business owners or managers has the best chance of success. The organization cannot be run like a government entity but like a private business with the one clear goal of increasing sales, increasing profit margins and keeping expenses down and in control. Collectively, among the group, there will be expertise in bookkeeping practises, expertise in operations, expertise in sales and marketing. If there is an area lacking in expertise, they will know where to find it. The organization should already be in existence with a proven track record for positive results. The new organization should not be formed for the sole purpose of tourism as it will always be spending more time and money keeping itself in business than promoting and advertising the region to get people here! Municipal elected officials and staff should act as a resource to the regional organization. Municipal staff can assist the organization in finding a route to financial resources and should support that organization out of its own municipal budget. However, municipal staff should not have the capacity to make decisions. Decisions must be made by the business owners themselves. I have a large problem with the current suggested geographic boundary lines. We must look at the Bay of Fundy. The Bay of Fundy and the Annapolis Valley is too large of a geographic area to promote well. We are not sure what the answer is!</p>
7.	Regions may be overlooked without regional organization. That said, regional organizations should not be industry association but municipally backed such as the Regional Enterprise Networks.
8.	The Annapolis Valley Chamber of Commerce has been operating in this fashion for the past year and they have brought together both industry and funding partners to create a destination awareness of the region. Despite roadblocks and other challenges they have made their campaign heard and have encouraged everyone to come together for with the same goal in mind and increase visitor numbers in the area.
9.	We need a strong group to get the people motivated. They have tried shared management in the past and it doesn't work. There needs to be a leader someone who really cares about the regions and not just their own operation. Someone who sees the whole region as a year round destination.
10.	yes
11.	each region should be responsible for its area
12.	Each local region needs to be administered by a local authority. Which can give better insight and a more targeted approach to marketing for each local region. I feel each region needs to be independent of the other, to create competition, which is a healthy alternative for everyone.
13.	Regional based with municipal and industry working with NSTA in a format that permits a focused approach to growing tourism as determined by the regional organization
14.	Regional focus, industry led
15.	I am actually confused as to which model is being described in which section. The whole process was very confusing- and I am a university graduate (dean's list as well) and have operated tourism businesses for years as did my parents. I was never heavily involved with tourism agencies, which it seems this whole process is geared for. I think that the blanket tourism model- Destination Southwest Nova was not as effective as the regional models, i.e. South Shore Tourism Association. I therefore prefer a more regional tourism model. I would need to understand more the situation where there was no regions at all but just work

	directly with NSTA. This could possibly be a more effective approach but I would have to understand it better.
16.	It would be easier to manage, the former system did not work because it was too large an area.
17.	The community is responsible for its own success and funding goes to communities that work for it
18.	Regional organizations would be able to focus attention to specific areas for improvement. These areas could be different from region to region.
19.	I think it is important for clarity for the stakeholders and the visitors
20.	Local understanding will lead to more targeted and efficient allocation of resources.
21.	-
22.	Better, more focused, more relevant, with representation from people who live in the region.
23.	Because each area knows their area better and what their needs are. They know what they have to offer tourist and that is hard for someone living in say Halifax promoting the things that that Cape Breton or Yarmouth have to offer.
24.	each area has separate issues
25.	Regional tourism operators know their area best!
26.	local/regional knowledge essential
27.	It appears to be probably more effective.
28.	Seems to make more sense than the other two options
29.	I think each region needs representation
30.	Each regional organization would have the local knowledge and feedback and to know which areas and attractions needed more support or more effective/focussed marketing. The best driver for collecting and applying the resources and funds needed to market effectively is a hands-on regional group.
31.	Local representation allows for better marketing of the specific products and events that happen in each region.
32.	I saw nothing wrong with the South Shore Tourism Association. It seemed to work, there was industry buy in, Lynne Perry knew who the members were because the area was a manageable size for the employees she had; members felt they had a voice and were represented. DSWN was too big and could not offer that personal relationship with the small business owners of the areas
33.	I feel that this option is the best for rural areas.
34.	seems to fit our region
35.	It seems to be the soundest option.
36.	I feel that YASTA is working for us now and is already in place therefore if we have something that is working for us now and with us then why not go with them rather than

	giving all the control for all 3 regions to one specific organization. I feel that each region needs to be separate but work together as a team and with each other to promote within ourselves to make the Tourism industry stronger.
37.	The local options know our properties.
38.	Each region knows it's own strengths and weaknesses.
39.	Region led tourism is most knowledgeable and adaptable to the needs of each particular region.
40.	survey is ridiculous , leading questions ,
41.	We need to work together not in separate pods
42.	Accountability and local response to needs in an area!
43.	no comment
44.	They are in the region being promoted
45.	Less confusing - one stop shop that is funded by government - people will know who and where to go. Tourism will be consistent and flow.
46.	It is very important
47.	Promotion of the area to get people to come who might be hesitate about the area. Nova Scotia ia more than Halifax and Cape Breton.
48.	When our area has a Regional Organization we get more help with funding etc... otherwise areas like Halifax, CB & Peggy's Cove area would be seen as more important than Digby & area... we need a regional to go to bat for us
49.	Seems most efficent
50.	Local people know their strengths best
51.	50% of Nova Scotia's population is within a 1 hour drive of our facility.
52.	Communication and working with local groups.
53.	I have been in the tourism industry for over 15 years and feel our region would benefit more by joining with its promotions through NSTA rather than have money split and maybe duplicated we can use a larger fund to develop our product we call spend the money wisely for each region. I am hoping if we are more involved in our planning with the NSTA we will have more promotion dollars can be tied into working together in a common cause of encouraging more travellers to Nova Scotia....
54.	Regional tourism is insightful to the local and regional needs of the community
55.	Grass roots level organizations have a better idea what is happening on the ground in each area. People in Halifax or Windsor have no idea what is happening in Yarmouth or the South Shore. We all know what needs to be done; we just don't have anyone to fund us.
56.	I like this model because I like that we could work with others in the region as a group to best serve the Tourist coming to our area.
57.	The first option seemed to be a good combination of regional input along with TIANS expertise.

58. R.T.M.O knows the local market demand, the promotion to be made and the resource we have.

You selected Option B: Shared Leadership with NSTA Led Marketing as your preferred regional tourism partnership model. What is the main reason why you selected this model? Please be as specific as possible.

#	Response
1.	Greater opportunity to invest in product and less need to invest in bureaucracy
2.	There needs to be a strong, single window, approach to marketing Nova Scotia as a unique vacation destination. At the same time, regions need to recognise their responsibility for developing product, and working with the NSTA. However, regions should not be larger than a municipality and should be for product development purposes only. The current tourism regions are unwieldy and should be retired.
3.	It would be my hope that with a GOOD provincial leader in each area we could deliver a more unified message and hopefully share successful efforts and delete redundant and unsuccessful efforts of the past.
4.	Not as top down.
5.	in this one we share responsibilities and can work together for the good of our region, the last option wouldn't work at all and this one seems the best of the three.
6.	money.... This survey is very superficial and difficult to answer as there are so many variables that have not been discussed.
7.	Marketing is and should be a top priority, Marketing has been almost muted in SW NS. Marketing requires a specific set of skills and resources which many of us in the industry do not have. For example Bear River has about fifty artist in residence , Who Knew?)
8.	Nova Scotia, as a province is one natural beautiful landscape and should market itself as a whole. NSTA should market Nova Scotia by themes. This where the First nations were first, the founding acadian, black and scottish colonies of north america began - We have over 400 yrs of history to share that should be developed under provincial led marketing and precisely target marketed
9.	Having annual regional marketing campaigns would be useful, because the NSTA has the advertising expertise that tourism operators lack. Also, the fact that there would be annual campaigns means that the themes can change to showcase a variety of attractions over time (e.g., not always featuring Peggy's Cove and Lunenburg). By making novascotia.com the go-to website for tourists (with the added benefits of an enhanced regional presence and cost savings by not having a regional website) makes sense and cents.
10.	One clear central brand is essential and would be guaranteed with this model. Use the marketing know-how the NSTA has (or at least should have) instead of duplicating efforts and each hiring their own "marketing specialists".
11.	Working together, NSTA hearing what we, regions, need and want to be recognized. Unity and fairness is necessary.

12.	There is no version D - the Option B is the best under these conditions. Option D: A mainly industry driven TOURISM NOVA SCOTIA
13.	Yarmouth and Acadian Shores needs marketing and promotional support from the central tourism agency because this region is more isolated and cannot benefit from "drive through tourism" as can many other regions. Also, promotional support for the ferry from the province will give tourism operators encouragement - and hold them accountable - to maintain and expand their businesses, which will draw other tourists.
14.	-should eliminate duplicated efforts for marketing -website efforts and traffic directed to provincial site with drop down to local sites
15.	Efficiency, skills, track record
16.	One group with focus for the region. Together, we are stronger. NSTA will bring its experience and talent to the marketing and the marketing will be consistent, with the rest of the province.
17.	...
18.	It gives balance to the program . This eliminates the possible lobbying of funds and bias. I would hope this would have the decisions made based on good business, ROI and possible execution.
19.	I believe we have proven in our region (SWNS) that an RTA does not work (at least not in it's past form). It is an area too large to adequately be represented by one entity and too many RTA's work against each other. The regions should be concerned with product development and the marketing of these ideas should be left with professionals.
20.	This option best combines regional input, buy-in and industry support with marketing that will be consistent with and will leverage the NS Tourism brand, and will have sufficient resources allocated to it
21.	I don't want to see with tourism what happened with business with the regional agencies competing and essentially hurting each other. We need a big picture, not a mememememe approach.
22.	We need more help from the province. Volunteers are being constantly burnt out from trying their best to promote their region and events.
23.	n/a
24.	Because it feels right, looks right and seems to be a workable option in terms of balance and shared responsibility.
25.	The responsibility for overall planning needs to be centrally controlled for continuity across the province and local flavour and cultural uniqueness should be supported. This requires a shared vision and control by all stakeholders.
26.	Important to maintain consistency with marketing in developing regional marketing campaigns and regional presence on novascotia.com. Central department to oversee all regional initiatives.
27.	We felt this was the best blend of regional involvement with Provincial leadership of programs.

28.	This model demonstrates more shared responsibilities to ensure more involvement and hopefully from that more progress.
29.	I believe that is the option that will best suit our needs.
30.	Maintain local involvement with NSTA Marketing to insure no one area is overlooked.
31.	NSTA should be more closely involved with the issues in each region. Boots on the ground. Want to see government produce fewer pie charts and graphs and take greater responsibility for outcomes. DSWN 100,000 !! Enough said.
32.	There is no need for a regional website, if we can direct visitors to the different regions through Novascotia.com and reduce the need for operators to update listings on more than one site, then this is better for everyone. NSTA is doing a great job marketing the province, once they get them here it's our job to get them to visit us. While we don't have a lot of money to work with....promoting NS as a whole and marketing it as such is the key.
33.	It balances a strategic plan developed by the Province with the essential role provided by local knowledge and creative input.
34.	We still play a role. We must all share a responsibility and we need to stay in contact. Partnerships and teamwork, knowing what is going on is important.
35.	This option provides focussed marketing support from NSTA yet allowing for strategic regional input. It also reduces unnecessary and duplicated administration costs.
36.	I think it is important for the local region to have a major share of input
37.	shared responsibility
38.	operators on the ground are well aware of local 'needs' and do the actual promotion of the province and area. The shared responsibility provides this input to those who are not actually in place to see the need or experience the attractions locally.
39.	It is important to have a regional presence to understand specific challenges in each region but a global perspective of the whole provincial tourism picture is also required to provide leadership and guidance to each region to have a similar look and feel to tourism in each region.
40.	local & provincial perspectives working together.
41.	Better working together on same ideas for a stronger message.
42.	It was really hard to select between A and B as they are almost the same. Sharing just seemed better option.
43.	Local input required
44.	I think a shared approach with both partners would make the most sense (from a communication and funding standpoint).
45.	"Work with groups in region and NSTA to develop product, events and experiences" "Marketing Lead: -develop annual regional marketing campaigns -create and maintain enhanced regional presence on novascotia.com vs. regional website (to reduce costs)"
46.	I feel it is always good to have two separate parties working together - there can be no exclusivity or local favoritism when two different groups are sharing responsibilities

47.	There is little to no funding coming from Municipal partners any longer. Without that money it is hard to run a RTIA. I also don't fully agree with the definition you have above. NSTA should not lead the marketing it should work with the RTIA and partners. The agency should listen and act according to what the grass roots has to say. Do not set policy and then think it will be followed. Work with those on the ground.
48.	I think it is a waste of time and money to have separate regions create their own marketing standards when it could be all coming from one marketing group. That way it can be clear and concise but tweaked for every group instead of a few groups having it all over the board
49.	This seems to offer the best of both worlds so to speak. It offers the expertise of the NSTA to the regional tourism agencies and the marketing is done by those who can approach it best. It also does not leave a ton of work to any one organization.
50.	NSTA doesn't have total control
51.	The NSTA Management Approach (Option C) requires complete trust from regions, a context that will require time to develop. Option A has the potential to leave regions unconnected with minimal need for communication with the larger Nova Scotia picture. While it is clear in Option B that NSTA takes the marketing lead, it also assumes substantial communication on a variety of organizational concerns. It is this communication that has the potential to build trust, while the new element, NSTA marketing leadership, is being implemented. It may be most cost effective and therefore attractive to the Province to consider implementing Option C. But the distrust such a unilateral imposition might create could more than nullify all the potential savings realized - more prudent to take the step-wise approach.
52.	I think all the regions have their own strengths that need to be recognized and marketed. NSTA has the means for marketing but not sure they understand / relate to each area. The whole area as one region is too big of an undertaking
53.	My opinion is that while regions know themselves best they may not have the expertise or vision to see the big picture in marketing Nova Scotia as a "FULL PACKAGE." It has been my experience that the locals (through years of conditioning and necessity) are so afraid to look at the big picture and of "sharing" the wealth (in case someone gets part of what they perceive as their share) that they create a fortress mentality around co-operation and collaboration. All this achieves is a fractured, half hearted, underfunded or supported attempt to achieve something that could have been far more successful without burning out the participants or the cash, and would have had a greater overall impact. At the same time collaboration and co-operation could showcase the best of all the assets of the area as well as the professional product it would no doubt produce!
54.	Of the three, Option B seemed to be the most promising.
55.	The selection speaks for itself
56.	programs need to be more coordinated provincially, Might be a few more fund distribution pieces that should be controlled collectively, However it is very important that regions have input and control, a larger organization may lose sight of some of its parts. I'm curious where the rest of NS is (Pictou, Antigonish and Cape Breton) are. Why not include the entire province?
57.	Develop annual regional marketing campaigns

58.	It stresses local involvement which gives more ownership and thus more active participation with results being more visible! May also be a better use of monies as less salaries being funded.
59.	need the expertise
60.	I selected Option B because I know how hard it is for small regional operators to do their own marketing. In my opinion it is critical for NSTA to lead marketing in the broadest sense...advertising in other countries or regions of Canada, setting guidelines and holding small operators accountable so that the brand is clear.
61.	I feel it is the best way to develop tourism growth in NS with very defined roles by all partners.
62.	"Develop a tourism growth plan for a region": That means a lot for rural Nova Scotia. It equates to keeping attractions open, promoting our shoulder season especially in the fall. It is just what I said in the opening statement. Halifax remains busy with the cruise ship traffic. We need to get people to fly or drive to see more of Nova Scotia than just a city. It is harder in the rural area's to get people here.
63.	NSTA has the marketing expertise which would greatly assist our small town.
64.	k
65.	I feel that with NSTA being able to assist with marketing of the areas, that development of a good and equitable marketing plan can be put in place, while the Regional Tourism Organizations can still have involvement in the processes.
66.	Liked the marketing approach better.
67.	This option leverages the marketing strength and buying power of NSTA. It's also the preferred option for maintaining brand alignment with the province. Allowing NSTA to lead the marketing significantly reduces the DMOs overhead and allows the team to focus on member engagement and product development.
68.	The main reason I chose option B: Shared Leadership with NSTA Led Marketing is so we have a unified voice, a consistent presence in the marketplace. With the current situation, Cape Breton gets most of the non-HRM visibility. It would be ideal if each region had the same level of marketing, a similar look and feel to the collateral.
69.	NSTA did a good job marketing to the eastern seaboard of the United States for 2014. We can learn from NSTA marketing for 2014 and promote each region aggressively in partnership with NSTA.
70.	Local participation is crucial and local knowledge of the area and historic sites and places of interest is similarly important Plus locals should take ownership and participate in the process Nata are the marketing experts and we should use and learn from their expertise
71.	It is abundantly clear that guidance and leadership in the region has been lacking for some time. A shared leadership will hopefully provide guidance and rebuild the trust needed to encourage partnership from all factions to develop these region(s) to their fullest potential.
72.	locql input is essential
73.	It seemed that there might be more opportunities for oversight. I have seen far too many

	serious mistakes made that might have been avoided with more transparency.
74.	Marketing is important for success in the region and is too expensive for smaller areas in the region to handle. I see an advantage too increase the amount of marketing by eliminating the need for separate published guides. More directed marketing can be accommodated online and with other tools. In addition, the size of the region can benefit from sharing online presence better. Packaging of the southwestern area is desirable and necessary.
75.	Share responsibility/ communication required
76.	I think NSTA and their marketing firm would have better contacts within certain geographical markets that we are trying to exploit.
77.	I prefer to see the sharing of responsibilities and ideas from both parties.
78.	don't know
79.	.
80.	History shows "top" down doesn't seem to work. Shared leadership, as a team, should work better, hopefully get ideas flowing quicker throughout the whole process.
81.	Fairness.
82.	The industry needs to focus more on product/experience development and that is where money should be spent at the regional level. If we are concentrated more on marketing than development we may not be able to deliver on what we are marketing. The visitor's experience is the most important thing and positive experiences equal positive reviews. Marketing materials, whether provincial or regional, need to be cohesive and when it is the responsibility of the region the quality can vary. Whatever model is selected there must be accountability for funding, low overhead and support from NSTA.
83.	I felt this year, NSTA did a much better and more supportive job than Destination South West Nova Association did in the past.
84.	Less administration but still have educated/full time help.
85.	It will allow the NSTA to focus more on provincial events and marketing that would affect Nova Scotia as a whole and then allow the regional organizations to concentrate on their area.
86.	Hopefully this would generate more co-operation
87.	Because they are interested in aiding small areas such as ours
88.	I feel the region will benefit from the resources available from the NSTA
89.	I doubt any scenario is going to please everyone. Share leadership seemed like the best compromise and the better use of resources. Building regional websites is a waste of money, to both construct and actually get visitors going to them. Pump efforts into NS.com. If you bring more people to the province at large, everyone benefits... rather than every little region fighting for their piece of the pie. Most travellers to come to my establishment have really combed the province over... they are just sticking to the main attractions. Option C, I think too many people will feel like they have been cut out of the equation and their "tourism" is in the hands of someone, in some office, somewhere, who doesn't know

	anything about their little business. Unless I'm misunderstanding the models.
90.	Wish to develop and receive assistance and guidance for the formation of specific tour packages that are appropriate to our region and community
91.	One central place where the majority of people could find information about events and activities
92.	what ever
93.	Burdening anyone with more project-based applications would be unfair, unworkable and produce uneven results with little or no planning.
94.	Shared leadership always works better.
95.	1. Input from region as to important priorities 2. More consideration of an integrated provincial strategy instead of solely focusing on what activities and products those on the regional boards deem as important. 3. Perhaps more knowledge of what is available within a region which can be passed on to NSTA
96.	It was difficult to determine the substantive differences so I focused on "Shared Leadership" with NSTA in the lead.
97.	It just seems to offer everything that needs to be done to have
98.	NSTA is critical for the overall co-ordination of the province's tourism strategies and the regions need to develop the specifics of the area's strengths.
99.	both 'groups' end up communicating / working towards common goal . 'Checks and balances ' would naturally be able to apply ie. appropriate usage of funding for salaries , marketing and continued financial support of ' best tested ' tourism infrastructure .

You selected Option C: NSTA Tourism Management Approach as your preferred regional tourism partnership model. What is the main reason why you selected this model? Please be as specific as possible.



#	Response
1.	DSWN Assn. failed as it was employee-heavy;; initially relied on membership; and its roles were not made clear. NSTA already has the ability and the resources to help these three regions.
2.	A unified and consistent approach will help all regions develop for the better of the industry as a whole.
3.	A change is needed; provincial dollars would be better spent on marketing and product development than on administration of regional tourism association . Tourism industry operators would feel that they had more control of their own destiny.
4.	Ownership with shared responsibility in marketing.
5.	The season was very good without our regional entity, making me wonder why we need it.
6.	So as to have the most dollars spent marketing rather than admim. Also to have an equal and consistant marketing for all!!

7.	Because it will eliminate perceived borders that may limit groups from working together. It will also eliminate having most of the moneys that are available being spent on staffing. I also believe that there are other ways to manage the VIC's, the season of 2014 went great and a seasonal position could be put in place again. This option also leads to groups being able to go ahead and apply for funding directly. With this option, I feel there is no need for regional organizations, rather maybe have an advisory group made up of mostly industry people. This option should also allow to give help to groups that might want to do marketing in niche markets.
8.	I think an NSTA Tourism Management Approach allows for a more cohesive and integrated tourism strategy for the whole province.
9.	REgional efforts were a failure before and will be again. With a provincial model equality will be driven from a provincial model for funding. As well no matter what model will be chosen NSTA will be blamed for the failure, so might as well drive the bus if you are going to be blamed for crashing it.
10.	looks like it could be as fair as possible in my area.
11.	The other two models have been tried and failed. Option C would free up money used for bureaucracy now that local groups could tap into. Also would allow groups over different areas to join together for projects that would benefit them and the area.
12.	Because the geographic area included in our zone (which should be called Western Nova Scotia) is so large and the strengths in each area are so very different, four or five regional authorities would spend too much time and resources on competing with each other. A NSTA management approach could actually use each region's strengths and use them to compliment each other ending up with a seamless flow of tourists from one region to the other finding a new and exciting experience each time. A true vacation full of historic, cultural, culinary, heritage, outdoor, interactive family adventures that will keep generation after generation returning. History has shown separate, independent regional representation creates duplication (that is being kind as most times it is triplication or more) and unnecessary competition. Funding tends to be focused rather than on the big picture.
13.	I selected C because it's a NEW approach - one with low overhead, which will minimize the amount of politics and admin costs, and maximize the amount of marketing dollars. This model will essentially dissolve the regions and boundaries and encourage the development of strategic marketing partnerships, based on themes and/or geographic corridors.
14.	We need a unified, consistent, unequivocal face for tourism in Nova Scotia. Regional marketing is confusing to the visitor. We need a single point of contact for industry - no confusion over which agency deals with what. Allows partnerships to form with no 'false geography' in the way. Opportunities for business-led initiatives.
15.	As previously stated, I believe the way to progress is not about regions
16.	the other two models have not worked in the past, this model would mean less bureaucracy and would allow for groups to work together over different areas. an example is the acadian passport which is over a wide area and cheaply benefits many regions.
17.	it seems to be good for all involved.
18.	Stability

19.	the three options for a regional RTA are not appropriate so Agency might as well organize whole thing.
20.	jkdinlkaj
21.	Less administration costs and duplication. Also, the NSTA mandate is to market...so market.
22.	Less bureacracy
23.	Nova Scotia Tourism do an excellent job of promoting all of Nova Scotia. We, Shelburne Harbour Boat Tours benefit from their efforts! Thanks!
24.	I feel the other options are too fragmented and lead to fragmented messaging and less impact. One NS tourism website is critical and focus all information through that portal. It is the only way it will become the key go-to place for Tourism information. Good branding reinforces the same messages, the same look and feel. Fragmenting will destroy the effectiveness of the overall messaging. There is lots of opportunity for unique local events, festivals, destinations to shine and express the regions of the province. This will focus local energies on better supported endeavours rather than trying to duplicate efforts that should be done on a Provincial level. The support infrastructure, the tourism web presence, the major deliverables should all be coordinated at a provincial level.
25.	Efficiency as well as a unified messaging outside the province.
26.	no comment
27.	This seems a way to put less money into bureaucracy and more into the funding, programs and marketing. There would still be a need to have local representation somehow, but that could be accomplished through existing organizations like the Valley Chamber of Commerce, or Boards of Trade, etc.
28.	We need to be heard & loudly, depending on others can be problematic
29.	most entrepreneurial
30.	NSTA Tourism Management has the most experience
31.	unified approche and consistent message.
32.	This option seems to be industry driven and with the right tools and incentives it could eventually be a healthier model for long term development and reaching realistic goals.
33.	need centralized, professional, and consistent management & organization
34.	Consistency within Nova Scotia for all tourism regions.
35.	The decision makers are usually arm's length from the projects and can make unbiased decisions; tourism needs to be promoted/advertised on a provincial basis
36.	Sell NS as a whole and then branch into different regions
37.	In fifteen years we have yet to see ANY value at all come from any previous RTA model
38.	its a more objective
39.	Poor management from regional groups How many have we had in the last 20 years?
40.	In my opinion this model provides for maximum dollars to go toward marketing and product development as opposed to administration. I would support the idea of having a

	designated Tourism Officer for each of the 3 regions who would be the field representatives and primary point of liaison between individual industry people or industry organizations and the NSTA. Much is already being invested in having 'experts' within the NSTA, so why fund other organizations to essentially provide the same service.
41.	Every level of bureaucracy diverts much-needed money and resources to administration rather than to actually DOING something useful. I am in favour of whatever approach will MINIMIZE bureaucracy and deliver funding to the people who actually provide goods & services to our tourists.
42.	This model will mean less admin dollars and more dollars for industry and marketing. Let the different communities and organizations decide where to best put their tourism dollars, and allow all groups a process to apply for marketing support.
43.	More independent, market-driven approach, with better incentive for entrepreneurialism.
44.	Politics and favoritism rule, not tourism centered initiatives, when a 3rd party is not coordinating.
45.	The NSTA model, if it focuses on sectors not geographical locations, will do what is best for the province as a whole. Regional boards seem to compete for resources, duplicate effort and be generally less efficient.
46.	Direct approach. Leadership from the community and the provincial level. Community responsibility for project coordination and applications to central organization - keeping the focus on the big picture.
47.	Should be a Provincial effort.
48.	Funds distributed through criteria based business plans to avoid regional rivalries. Access to / assistance with media and communication specialists.
49.	Uniformity
50.	One thing we need to avoid is the creation of another layer of bureaucracy that drains financial resources and achieves less than local organizations representing and promoting local initiatives.

Thinking about the three options for regional tourism partnership models, is there a model that you believe would work better?

Response	Chart	Percentage	Count
Yes		46%	89
No		54%	103
Total Responses			192

Please provide details of your preferred regional tourism partnership model.

#	Response
1.	NSTA takes the lead and meets with regional tourism reps on a bi-monthly basis for input. Let the regions fund their own VICs, but allow them to apply for grant money from NSTA to assist. These 3 areas (south shore, valley/Fundy and Yarmouth) will never agree on an outside office (beyond NSTA) "controlling" them.
2.	I believe the first option which would have the regional DMO work with the province and support their marketing efforts. It also allows each region to develop product that supports the provinces target markets and experiences.
3.	A Shared model, as long as we can avoid the "political" divisions that have plagued SWNS. We need to invest in the products, and marketing them, and not lose energy in parochialism.
4.	as described on previous page
5.	After all this time, it is very underwhelming that in such a small province the conversation is still all about how to spend money establishing layers of structure while the cost to operate in this province is strangling small operators.
6.	Allow the reestablishment of the loop concept in S W N S ---- perhaps just for marketing ----- developing a true destination easily defined in the visitors mind ; truly beneficial to both Ferries .
7.	Option B
8.	option 2 is shared with nsta ,yet each area would be represented , I realize there is not a lot of funding but its just seems the best of the three choices.
9.	Option B....best for marketing... Needs a conversation. Three regions did not work in past, could be smaller product regions. REN doing tourism needs development. Where does the funding come from?...
10.	I believe we need to look at the region, i.e. Routes . South West NS is circular ,easy to navigate by vehicle. When you add the entire Anna Valley/ Bay of Fundy as one entity , geographically this may look plausible on a map but is not in terms of planning ones itinerary.
11.	If each of the founding cultural groups had funding to permit them to work in their own cultural group but on a province wide scale, they would be able to develop more targeted tourism packages, as well as cultural products that are inter-related, rather than be

	in competition with one another.
12.	There should be one province wide entity marketing the entire province.
13.	Option C.
14.	Designation of regions is extremely important - all agreed - but, the regions should have input into the region selection and not have it dictated by people who do not live and work in the designated regions. Also, contacts - there should be a specific contact for each region. Small towns do not want to call someone in Halifax to find out if it is ok to do anything. The regional contacts can stay in touch; the regional contacts can deal with NSTA
15.	Number 2 with NSTA-led marketing
16.	Option B combined with more accessible funding for product development by local groups as well as flexible funding for cross-boundary marketing and product development efforts (that still fit within the central NSTA branding). Give local groups the opportunity to build on the existing product while ensuring a central unified approach. Absolutely essential: make sure people feel like they are being heard and included in the central branding and marketing approach. The proposed area of Annapolis Valley and Bay of Fundy shores is far too large. To make sure all feel represented you need to be able to get all together within a 2 hour drive maximum, you cannot do that with an area this large. I have nothing in common with Parrsboro, just like Parrsboro businesses likely have no clue about me and no interest in what my area has... That is not a way to start off. For a cohesive marketing approach and a good central message you need an area that is manageable and where people and businesses feel connected. The Annapolis Valley & Bay of Fundy area as proposed is not manageable and just setting things up for failure. I would say to keep the name but end the area at Windsor. From there you can always do specific "Bay of Fundy" marketing campaigns where two regions (our area and the separate Truro to Joggins area) work together. Again: cross-boundary marketing and product development efforts are essential.
17.	Working with NSTA to develop programs, advertising.
18.	Option #3 for all the reasons I mentioned in the last question. The elimination of borders is the key as well as the elimination of administrative costs. It would mean everyone is on a level playing field. Hopefully then good ideas will be rewarded no matter where they come from. However it will be key to have an advisory group to work with the NSTA.
19.	I would suggest a model that combines elements of all 3 models - NSTA as the overall tourism leader with input and assistance from the regional organizations. I think restricting it to 3 tourism organizations for the 3 regions would not work effectively. For example, where would Clare fall into this model? They have opted out of Yarmouth & Acadian Shores so how would they be represented in a 3 organization model?
20.	NSTA driven. IT would be consistent and equal province wide. the model would provide transparency and staffing. Otherwise we risk using money and time management to staff up the other options.
21.	The regional approach would work best, because even if the province were to take over all marketing these small groups are going to still pop up and flood the market with a mixed marketing message and dilute the Nova Scotia marketing message. Taking a regional approach and working with a regional group to help direct their marketing to be in-line with the provincial marketing messages will help control the overall message that is getting to the consumer rather than the free for all it will be if the province were to take over

	everything.
22.	option 3
23.	A regional Tourism group for the South Shore. Destination Southwest Nova was representing too large an area, with distinct different products and needs. Sometimes big is not the answer.
24.	NSTA led and managed with representation from the regions in the form of a Consulting Board made up of representatives that are prepared to use their strengths to make Western Nova Scotia the "Destination Area" of Atlantic Canada.
25.	The preferred tourism partnership model is having an organization to represent Yarmouth and Acadian Shores, Annapolis Valley and a third organization to represent the South Shore.
26.	Option C offers a NEW approach. It will mean more direct \$ for tourism initiatives, increasing dollars available to support regional marketing projects, by spending less on administrative costs. It will offer a more flexible approach to industry partnerships and will encourage industry to seek out new and strategic marketing partnerships, knocking down the travel region boundaries. Option C also reflects well the philosophy of the One Nova Scotia Ivany Report. Let's face it, the RTIA system of the past 20+ years has not worked effectively for SW NS. The 3 RTIA system (ETTA, SSTA, YCTA) did not work, due to too much \$ being tied up in administration, political boards with limited marketing \$. The amalgamation model that followed with DSWNA was no more effective, too large, weak leadership and not enough \$. As someone who has participated on RTIAs both models, I have spent countless hours attending meetings with ineffective results. Option A will not work either: it will be impossible to have all industry and municipalities on board, especially when the provincial funds available are limited to begin with. If the smallest region (YASTA) can not make it work (Clare has opted out), then how can this approach work in the much larger SS and AVFS regions with dozens of municipal units? How do you deal with 'frontier' areas that could be part of more than one travel region? It's time for a new approach, a simpler approach. Let the pros (NSTA) lead Regional Marketing and expand/enhance the promotion of the travel regions on novascotia.com. NSTA staff will of course continue to consult with the industry to update content. Allocate more dollars to help fund strategic marketing projects, festivals & events and partnerships that support the NSTA Tourism Strategy and Annual Plans. Let TIANS continue to administer the VIC funding and come up with a regional VIC strategy. Thanks for the opportunity to provide comments.
27.	I think the shared leadership model would work best as you have two resource pools and having the NSTA equally as involved can act as a nonpartisan member to gain insight from an outside (out of region) party.
28.	It should be an agency that has the business acumen to evaluate spend properly. Be able to effectively reach the entire region. And should not be influenced by lobbying but rather by a business like approach and be able to understand how and where we need to increase Tourism.
29.	The preferred model is a regional tourism organization supporting and providing input to NSTA led marketing. Ideally the regional tourism organizations would continue to be supported by NSTA and would be aligned with the regions as outlined in provincial marketing (i.e. to maintain consistency)

30.	Considering the geographic size of the previous region, smaller regional organizations would have greater input and effect in obtaining input from industry and visitors. A working partnership with the NSTA is necessary as together we are able to create and meet the ongoing demands of promoting our destination and making ourselves heard in the marketplace.
31.	I think that there needs to be more effort put into developing our rural communities because that is where the real experiences are. The regions are too large and spread out maybe add one or two more sub regions to help the communities inland have some help with developing their areas
32.	Shared
33.	See previous comments about more direct involvement of government and stakeholders. Regional Tourism authorities are not in my opinion 'stakeholders'.
34.	Given the options, I believe that option B would be the best fit for us.
35.	The proof is in the details of how the Province and the Regions are organized, the manpower allotted to getting the work done, the process of true community input, and, of course, BUDGET for implementation.
36.	DSWNS model is still best model; just updated and will better leadership.
37.	I don't understand why we need so many groups.
38.	Regionally led
39.	A more local representative organization has many benefits as everyone is closer geographically, they understand and are familiar with each other's area and they have more in common.
40.	NO 3
41.	-
42.	I think I have done that on the previous page... the major initiatives, especially the communications strategies and products, web presence etc., should be developed by the NSTA. Local events, festivals, activities that are (somewhat) funded and encouraged by the NSTA, should be delivered by the regional players on a community level where it can be done best.
43.	As previously noted.
44.	I believe YASTA is doing a great job for Yarmouth and I would like to see them have the opportunity to partner more with NSTA.
45.	Option 2 - didn't I already tell you this?
46.	I'm not sure how this is different than the last question... sorry. Another comment though - the region itself must be redefined - the Annapolis Valley should be a region on its own and not joined with everything as far as Amherst.
47.	Option B but not in the way you have defined it. You give 3 options from your point of view. It needs to be tweaked. Work with grass roots and listen to what they have to say. They know what works best. Assist them or work with them in developing a strong marketing strategy and also assist in creating better stronger product or use what is already in place.

48.	For both Option A and Option B, it would be better to concentrate on the concept of communities of interest. While the Bay of Fundy does connect the Parrsboro area to the Annapolis Valley, Clare and Yarmouth, there is not as much shared history, culture and economics. Also, for the automobile traveller, the Parrsboro area is very remote from the other three areas. Wouldn't the Parrsboro area be better matched with Truro or Amherst?
49.	Co-operation and collaboration in scenario #2 utilizing the best of everything and everyone we have to produce the most professional and successful product we can manage.
50.	Option B, only if industry and government can work together. Where is the \$\$'s going to come from?
51.	Strong voice and leadership locally, programs run from central location, perhaps more staff can then focus on improving the experience rather than running the program.
52.	Overall sounds better.
53.	It is option B.
54.	Giving control of decisions mostly to local areas and not leaving it up to provincial employees who may not have first hand knowledge of the area. Creates more opportunity for buy in from small businesses (who make up many of the businesses in all areas) Once you have buy in from them you can get it from local governments thus creating the cash flow the organization will need to operate and market. It's all about personal connections and making members feel like they are a part of something meaningful. Again, DSWN was too big for the amount of employees it had representing the areas. Too much work, too big of an area to connect with.
55.	NSTA in direct partnership with individual municipalities would be our preferred model. We are not averse to working together with other municipal units however, the current configuration places us in the Annapolis Valley quadrant. We feel in terms of tourism that we may be more aligned with the rest of Southwest Nova and would like the opportunity for greater partnership with them. Also, depending upon the grant funding structure, small municipal units might be overshadowed by the requirements of larger municipalities.
56.	Shared model.
57.	Please refer to my response to the previous question.
58.	We need to go back to one RTIA (or other terminology) for each region. The challenge from day one with DSNA was that the three areas could not agree; each was so different from the others.
59.	An organization that knows what the visitor/tourist really wants. It is incomprehensible that the people with Front-line contact with tourists/visitors and potential residents - the Visitor Information Centre managers and employees - have little or no input, and are the last to know what is happening and how it affects their customers. In the past, they have been herded into a room every year, and told what they must do, how they must do it, and what will happen if they don't comply! But, when visitors comes to a town or region, they don't ask for the provincial/regional decision-makers in the area; they don't care what happens behind the scenes; they simply want VIC employees to have access to what they (the visitors) need to make the most of their stay in the area. VIC employees are the face of tourism; and yet they have no real input. Ask an employee, instead of telling an employee, about input - you might be surprised at how much they know about tourism in their region

	and how passionate and dedicated they are about sharing it!
60.	one regional group collaborating with NSTA
61.	call me 1 902 430 8635
62.	Local area partnering is essential, but an opportunity to package the larger region is an advantage as the region embodies all that is good in Nova Scotia.
63.	A province-wide approach that doesn't fragment the province into regions, and instead provides a powerful unified voice to attract out-of-province tourists to ANYWHERE in the province.
64.	NSTA manages marketing support for each region, using its website, print media and social media. Province could coordinate all regional guides. Communities will continue to promote themselves, too much politics for Regional groups to work.
65.	More shared responsibilities
66.	Minimize expense. Minimize central management.
67.	C
68.	shared input and responsibilities
69.	I'm not the one to ask as I find it all very confusing but ideally I would like there to be a Nova Scotia Tourism that is consistent across the province, has good hours, friendly staff and excellent knowledge of what to offer where they live as well as within a days drive. I would like it to be sponsored by the government and I don't want little groups here and there that all want money.
70.	Annual get together of tourism minded individuals to share ideas on how to improve overall tourism in Nova Scotia.
71.	More input regarding regional concerns with a regional representative to take our concerns to another level... I feel our area is not seen as being as important as other areas in the province...our VIC's are very important to the well being of the area
72.	Option B I think there needs to be regional representation but I don't think each region will be effective if they all screaming for attention at the same time. pool resources and work collaboratively to market the whole get more people traveling to the province in general and everyone can win. I wanted to attend the meeting but wrote the wrong date in my calendar. You should consider having a service for members to sign up for text message reminders to events like this. my doctor, dentist, and utilities are starting to do this and its effective. for me at least.
73.	Having a say at a local level is extremely important. This should be the basis for how tourism dollars are spent. Present each areas goals over a specific time frame. Present facts that support these goals, then award financing. Much alike a business proposal you would give a bank.
74.	We just all need to work together better and promote Nova Scotia for all its regions. We must work together as we have to travel through each region to see all of Nova Scotia's gems.
75.	A provincial organization with a clear view of the overall provincial marketing plan who provides balanced media advertising (no emphasis on particular areas of the province); has





an ability to communicate said plan to a regional board or tourism representatives who in turn are willing to work with all facets of their area and are acquainted with what is being done in developing tourism product within their district. There should be set percentages of tourism funding for each section of the province.

76. Centrally administered model with a tentative allotment of funds to each district, however if there are no suitable applications, then those funds would be released to other projects elsewhere.

77. B and A are acceptable in that order but not C in any scheme. Tourism should be managed by the tourism folks.

78. the nsta handles tourism marketing on the global scale and the regional authority handles affairs within n.s. boundaries ... continued communication between the 2 is paramount for tourism profitability and joint coordination to achieve a healthy fiscal goal .

Finally, to help us analyse the survey results, please indicate the are in which you work/reside.

Response	Chart	Percentage	Count
Annapolis Valley & Bay of Fundy		43%	86
South Shore		35%	70
Yarmouth & Acadian Shores		16%	33
Other (specify)		6%	11
Total Responses			200

Finally, to help us analyse the survey results, please indicate the are in which you work/reside. (Other (specify))

#	Response
1.	Bay of Fundy (Central Nova)
2.	AVON Valley
3.	Advocate Harbour Bay of Fundy
4.	Parrsboro and area
5.	Halifax Metro
6.	Central Nova, but spent most of my career on South Shore
7.	Halifax
8.	Gilberts Cove
9.	Cumberland County - Parrsboro shore

