

Tourism Destination Development Plan for Shelburne County: Final Report

Prepared for:
**Shelburne County
Tourism
Development
Committee**

Prepared by:
the **Tourism Company**

April 2010





1958 Mapleridge Drive
Peterborough, Ontario K9K 2E4

telephone (705) 772 8425
e-mail : darcy@tourismco.com
website: www.tourismco.com



April 19, 2010

Mr. Allan Nelson,
Chair
Shelburne County Tourism Development Committee
Shelburne, Nova Scotia

Re: Tourism Destination Development Plan For Shelburne County – Final Report

Dear Mr. Nelson,

We are pleased to submit this Tourism Destination Development Plan for Shelburne County Final Report.

Sincerely,

D'Arcy McKittrick
Partner
the Tourism Company

Acknowledgements

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

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

The Shelburne County Tourism Development Committee was generous with their time and thoughtful with their comments, providing direction and guidance to the consulting team – thank you.

And without the strong support and assistance provided by Ms. Suzy Atwood, Shelburne Country Tourism Development Coordinator, Mr. Jeff Spencer former Shelburne Country Tourism Development Coordinator and Ms. Joan Bower, South West Shore Development Authority, it would have been difficult for the consulting team to successfully complete the assignment – thank you.

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Summary of Conclusions & Recommendations

Opportunities & Issues

Shelburne County has a number of competitive strengths and assets that present opportunities for growing tourism in the region, including but not necessarily limited to:

- Compelling natural heritage resources including seacoast and beaches, rivers, forests & woodlands, bird habitat, harbours (particularly Shelburne Harbour), and Cape Sable Island.
- Variety of cultural heritage interpretive themes as the basis for compelling stories including Loyalist settlement history (Black and White Loyalists), boat & shipbuilding (Cape Islander, Dorys, Longboats), lobster fishery, Shag Harbour UFO incident, Sikh landing, Port LaTour (Charles LaTour).
- Attraction enhancement/development opportunities such as beaches, birding, kayaking, Historic Dock Street, Black Loyalists and Re-enactors.
- Diverse landscapes within the region – from rural to urban, agricultural to forest, seacoast to inland lakes and rivers.
- All of the Nova Scotia tourism icons are present in Shelburne County – seacoast, lighthouses, beaches, fishing villages, music, seafood, art and culture, rural landscapes, forests.
- The healthiest lobster fishery in Atlantic Canada.
- Temperate climate.
- Leveraged marketing access to origin markets through Destination South West Nova and Provincial marketing programs.
- Increasing importance and use of the Internet and the World Wide Web for travel planning and purchases, which substantially reduces the costs and barriers to marketing in origin markets.
- Newly established Tourism Development Coordinator position providing dedicated (albeit limited) resources for tourism development.
- Extensive road network within Shelburne County, although some sections would benefit from improvement/upgrading.
- Network of strategically located, well-equipped and operated visitor information centres.
- Substantial unused accommodation capacity year-round, including during peak June-September period.

The key issues that need to be addressed for Shelburne County's tourism economy to grow and expand include, but are not necessarily limited to:

- Moving beyond the early stage destination development infrastructure that is currently in place.
 - Attractions – lack of packaged experiences and widely recognized travel generators;
 - Accommodation -- lack mid-size and large hotels, and resorts;
 - Retail – limited number and variety of tourist oriented shopping opportunities; lack of geographic concentration/cluster; and
 - Transportation – sections of Highway 103 require improvement and upgrading; lack of public transportation to and within Shelburne County; uncertain future for ferry service into Yarmouth from the Northeastern U.S.
- Shelburne County visitor map and visitor guide require improvement.
- Limited distribution within the County (primarily Visitor Information Centres) of Individual tourism business.
- Lack of coordination in product development and marketing communications among tourism industry stakeholders.
- Lack of current, comprehensive visitor and visit data for Shelburne County.
- In the short term at least, many barriers to travel:
 - weak global economy and rising fuel costs;
 - Western Hemisphere Travel Initiative; and
 - Global health issues.
- Many strong intervening opportunities for visitors arriving by land to Nova Scotia, particularly immediately to the east within the South Shore region.

Markets

It is recommended that Shelburne County pursue both day trip and overnight or longer stay visitors.

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

To capitalize on the opportunities provided by **beach combers** travelling to and around Nova Scotia, it is recommended that the Shelburne County Tourism Development Committee (SCTDC):

- Establish and lead a task force of municipal representatives and tourism industry stakeholders to undertake a review of the County's beaches. The purpose of the review would be to:
 - identify which beaches the County wishes to promote for more intensive use by visitors;

- identify all obstacles to increased use of each beach and determine which if any beaches should not be promoted for more intensive use by visitors; and
- identify and recommend enhancement and upgrades to visitor support services and facilities such as way finding signs, parking, public washrooms, picnic areas, interpretive panels/signs, etc. at beaches selected for more intensive use by visitors.
- Feature those beaches selected for more intensive visitor use, and their beach combining opportunities, in “on-line” (Internet) tourism marketing activities as well as on a comprehensive Shelburne County Visitor Map (see recommendation in Section 3.4.2, Marketing Communications, below).

To capitalize on the opportunities provided by **birders** travelling to and around Nova Scotia, it is recommended that the SCTDC:

- Feature birding areas and opportunities in “on-line tourism” marketing activities as well as on a comprehensive Shelburne County Visitor Map (see recommendation in Section 3.4.2, Marketing Communications, below).
- Encourage, support and facilitate the establishment and operation of an environmental interpretive centre on Cape Sable Island to provide new services and facilities for birders (see recommendation in Section 3.7.2, below)

To capitalize on the opportunities provided by visitors interested in discovering **cultural heritage** travelling to and around Nova Scotia, it is recommended that the SCTDC:

- Encourage, support and facilitate the preservation and, where opportunities arise, the restoration of heritage buildings in the Town of Shelburne, particularly along Historic Dock Street;
- Feature cultural heritage sites and attractions in “on-line” tourism marketing activities as well as on a comprehensive Shelburne County Visitor Map (see recommendation in Section 3.4.2, Marketing Communications, below); and
- Encourage, support and facilitate the development of a Shelburne Outdoor Historical Theatre Festival as a new event attraction.

To capitalize on the opportunities provided by visitors travelling to and in Nova Scotia who are interested in **genealogical research**, it is recommended that the SCTDC:

- Encourage, support and facilitate groups and organizations interested in providing access for the public to genealogical resources and archives in Shelburne County; and
- Feature genealogical research resources and sites in “on-line” tourism marketing activities as well as on a comprehensive Shelburne County Visitor Map.

To capitalize on the opportunities provided by visitors interested in **geocaching** in Shelburne County, it is recommended that the SCTDC:

- Encourage, support and facilitate groups and organizations within the County that are interested in organizing and hosting geocaching events; and
- Feature Shelburne County geocaching resources and cache locations in “on-line” tourism marketing activities.

To capitalize on the opportunities provided by visitors interested in creating **nature art** in Shelburne County, it is recommended that the SCTDC:

- In collaboration with local nature photographers and nature artists, investigate the feasibility of developing a multi-day program for visitors interested in learning about and/or practicing nature art in Shelburne County;
- Encourage, support and facilitate the creation and publication, “on-line” and in map/brochure form, of an inventory of top sites and locations for creating nature art; and
- Feature the creation of nature art as a Shelburne County activity in “on-line” tourism marketing activities.

To capitalize on the opportunities in the County to attract visitors seeking **personal retreats**, it is recommended that the SCTDC:

- Encourage, support and facilitate the creation and publication, “on-line” and in map/brochure form, of information about specific commercial accommodation and rental properties suitable for hosting personal retreats; and
- Feature personal retreats and the favourable conditions for these as a Shelburne County visitor experience in “on-line” tourism marketing activities.

To capitalize on the opportunities in the County to attract **paddlers**, it is recommended that the SCTDC:

- Encourage, support and facilitate groups and organizations within the County that are interested in organizing and hosting paddling events;
- In collaboration with local accommodation and canoe/kayak rental businesses, investigate the feasibility of developing multi-day packages for paddlers that could include guided paddling trips and excursions; and
- Feature Shelburne County paddling opportunities, experiences, facilities and services in “on-line tourism” marketing activities.

To capitalize on the tourism opportunities related to the **lobster fishery**, it is recommended that the SCTDC:

- In collaboration with tourism industry stakeholders and interested lobster

fisherman, investigate the feasibility of expanding and shifting the current lobster festival to the peak summer season; and

- Feature Shelburne County dining locations that provide fresh seafood particularly lobster, in “on-line” tourism marketing activities.

To capitalize on the **auto-touring** opportunities, it is recommended that the SCTDC:

- Establish and lead a tourism industry working group to develop a plan for a network of auto-touring experiences, modelled on the U.S. National Scenic Byway Program. In concept the network would resemble a hiking trail network in a national or provincial park, featuring a few arterial or main routes and a series of loops (such as the Lockeport Loop) that connect to/from the main routes.
- Once the auto-touring network plan is complete, encourage, support and facilitate the formation of working groups of tourism industry stakeholders for each route or byway to lead and coordinate the development and implementation of each route. Beyond mapping, developing interpretative materials, and signing a route, the working groups would engage with tourism operators to begin offering a range of tour options and add-on tours options such as boat tour connections.
- Once the auto-touring network plan is complete, encourage, support and facilitate research into the feasibility of developing and implementing touring experience enhancements including, but not necessarily limited to:
 - Use of hi-tech interpretation enhancements such as GPS linked CDs or MP3s for use in autos or on iPods and MP3 players; and
 - Environmentally sustainable touring options such as bicycle, smart car and hybrid car rentals.
- In partnership with Yarmouth and Acadian Shores, engage with the province to develop and promote the concept of a Nova Scotia Circle Tour as a key to attracting Nova Scotia visitors who enter the province by automobile via New Brunswick, or by air via Halifax, to travel to Shelburne County for auto-touring experiences. This province wide route could be modelled on the Ontario/Michigan Lake Superior Circle Tour (www.lakesuperiorcircuitour.com).

Marketing

It is recommended that the SCTDC develop, implement and manage a **market intelligence** program to complement market research and data provided by the province. Such a program should include:

- collection of regular visitor statistics from Visitor Information Centres, attractions, events and accommodation operators;
- bi-annual visitor exit survey;
- tourism development effectiveness monitoring for marketing, product development and industry infrastructure development; and
- reporting back to the industry – Industry Market Intelligence Reports.

To further enhance Shelburne County's **World Wide Web presence**, it is recommended that the SCTDC:

- work with website owners to ensure at least one, and if possible many of the existing and any new websites are search engine optimized for searches by potential visitors from each of the ideal visitor groups (see Section 3.3.3, above);
- work with website owners to ensure at least one website provide an online searchable database of all Shelburne County tourism infrastructure – commercial accommodation, attractions, food & beverage, festivals and events, and tourist retail;
- create and maintain a destination blog, modeled after the Bay of Fundy Blog;
- encourage, support and facilitate the posting of photographs and videos of Shelburne County visitor experiences on

photo and video sharing websites such as Flickr and YouTube, with hypertext links to related content on Shelburne County websites;

- create and maintain a Facebook fan page for Shelburne County, populated with blog content (see above), links to photos and videos (see above) and postings by past visitors to Shelburne County; and
- work with Shelburne County tourism businesses and operators to ensure that visitors are encouraged to post reviews on TripAdvisor, and that the reviews are linked to Shelburne County websites and the Facebook fan page.

It is recommended that the SCTDC encourage, support and facilitate partnerships among Shelburne County tourism industry stakeholders to strategically promote Shelburne County in selected **traditional advertising media**.

It is recommended that the SCTDC work with Discover Shelburne County Tourism Association to ensure that Shelburne County maintains a strong presence in the **Doers' and Dreamers' Guide**.

It is recommended that the SCTDC encourage and support the continued operation of the existing **Visitor Information Centres** for as many days as possible between May 1 and October 31 annually, and for at least 8 hours/day – longer on weekends.

For the convenience of visitors, and to effectively **demonstrate the extensive inventory** of accommodation, attractions, food and beverage outlets, festivals and events, and tourist retail shops, it is recommended that the SCTDC:

- encourage, support and facilitate the creation of a single, comprehensive Shelburne County visitor guide and a single, comprehensive Shelburne County visitor map;
- encourage, support and facilitate the distribution of the visitor guide and map (above) at all Visitor Information Centres within Shelburne County, as well as at all provincially operated Visitor Information Centres throughout Nova Scotia;
- encourage, support and facilitate the distribution of the visitor guide and map (above) to potential visitors who request them prior to visiting Shelburne County; and
- encourage, support and facilitate the distribution of the visitor guide and map (above) to every household in Shelburne County to ensure that they are informed hosts for visiting friends and relatives.

It is recommended that the SCTDC encourage, support and facilitate the distribution of **print brochures** to as many business and other locations within Shelburne County, as possible, so that visitors who may not attend one of the Visitor Information Centres are

exposed to the brochures and have an opportunity to obtain copies.

It is recommended that the SCTDC:

- encourage, support and facilitate the erection of highly visible identifying **signs** at all Visitor Information Centres, tourism attractions and sites, accommodation, food & beverage outlets and tourist retail outlets within the County ;
- encourage, support and facilitate the erection of way finding signs for all Visitor Information Centres, tourism attractions and sites, accommodation, food & beverage outlets and tourist retail outlets at key intersections and along main roads within the County;
- encourage, support and facilitate the erection of “welcome” signs for communities within Shelburne County on all roads leading into the communities and along provincial Highway 103; and
- Over time, as new way finding and community welcome signs are erected and older signs are replaced, encourage, support and facilitate the use of a consistent design theme to convey to visitors a sense of connectedness within Shelburne County.

It is recommended that the SCTDC work with **festival and event** organizers, and other tourism industry stakeholders to:

- identify festivals and events with the potential and interest to attract out-of-County visitors (and revisit the list annually);
- develop a festivals and event schedule that minimizes conflicts and maximizes opportunities for other tourism industry players (ie. accommodation, food & beverage, retail) to capitalize on the potential influx of visitors;
- publish – “online” and “offline” -- and maintain a rolling 13 month calendar of festivals and events so that visitors attending a festival or event can be advised of when it will occur in the following year.

Longer Term Star Attractors

It is recommended that the SCTDC seek provincial and or federal funding support to undertake a market and financial feasibility study of the **Outdoor Historical Theatre Festival concept** as a tourism attraction.

It is recommended that the SCTDC seek provincial and or federal funding support to undertake a market and financial feasibility study of the **Cape Sable Island Environmental Interpretive Centre concept** as a tourism attraction.

Shelburne County Development Committee

it is recommended that the five municipal units comprising Shelburne County provide

sufficient financial resources to enable the SCTDC and Coordinator to undertake the tasks and activities outlined in this plan.

It is also recommended that the SCTDC prepare an **annual report** for presentation to each of the five municipal units that describes:

- the status of Tourism Destination Development Plan implementation over the preceding year;
- the economic benefits of tourism in Shelburne County over the preceding year; and
- tourism development and marketing initiatives to be undertaken during the following year, including a request for project funding as required to support the initiatives.

It is recommended that the Tourism Destination Development **Plan be updated** before the expiry of the current 5-year commitment, and that the update recommendations be used as a guide to determine the scope and scale of the next agreement between the five municipal units.

Discover Shelburne County Tourism Association

It is recommended that through membership in the SCTDC, and support of the recommendations in this development plan, the Association continue to represent the interests of Shelburne County tourism



businesses with respect to destination development and marketing in addition to its other tourism development and marketing activities.



1. The Assignment

1.1 Background

In response to increased global competition for visitors, deteriorating performance of the Shelburne County tourism economy, and in recognition of the importance of the tourism sector to the County's overall economy, Discover Shelburne County Tourism Association initiated the development of a long-term tourism destination development plan. The five municipalities comprising Shelburne County supported and continue to support this initiative.

The South West Shore Development Authority (SWSDA) was tasked with seeking funding and providing administrative support for the development of such a plan.

In the fall of 2009 the Shelburne County Tourism Development Committee (SCTDC) was formed to function as a Steering Committee to direct the activities of consultants in the preparation of the destination development plan and provide leadership for its implementation.

Also in the fall of 2009 SWSDA issued a "Request for Proposals" from qualified tourism planning and development consultants to assist with preparation of the destination development plan.

1.2 Consulting Team

the Tourism Company, a management consulting company located in Ontario (www.tourismco.com) was selected by SWSDA to undertake the assignment.

Mr. D'Arcy McKittrick, a partner of the firm, was the project manager. Mr. Michael Robbins and Ms. Jill Vandal, also partners in the firm, were members of the consulting team.

1.3 Work Plan

Work on this assignment was completed in four phases, as requested in the Request for Proposal. The key areas of investigation covered under each phase included:

- **Phase 1: Analysis of Tourism Trends and Market Potential** -- activities included in this phase included, but were not necessarily limited to:
 - Collection, review and synthesis of relevant background material;
 - Review of current and potential future tourism trends and their implications for the region;
 - Evaluation of past/current market visitation; and
 - Evaluation of market opportunities.

- **Phase 2: Review of the County's Tourism infrastructure** -- activities included in this phase included, but were not necessarily limited to:
 - Compilation of a tourism products (accommodation, attractions, food & beverage, retail, transportation) and resources inventory;
 - On-line survey of accommodation and attraction operators; and
 - Interviews with tourism industry stakeholders to identify tourism development issues and opportunities.
- **Phase 3: Identification and Prioritization of Tourism Product Opportunities** -- activities included in this phase included, but were not necessarily limited to:
 - Completing a product market match to assess product resources and opportunities against market needs;
 - Developing, testing (at an industry stakeholder workshop) and refining a long term development plan;
 - Soliciting review and comment on the Interim Report from tourism industry stakeholders.
- **Phase 4: Analysis of Potential for a Star Generator in the County** -- activities completed in this phase included, but were not necessarily limited to:
 - Case study research on catalyst projects in comparable tourism economies; and
 - Identification and pre-feasibility of recommended catalyst project.

2. Situation Assessment

2.1 Provincial Context

Data and information used for the analysis in this section were taken from the Nova Scotia Department of Tourism, Culture and Heritage website (www.gov.ns.ca/TCH) in January, February and March 2010.

In general, the Nova Scotia tourism economy has sagged over the past six years while experiencing some significant changes. Given the deterioration of economic conditions globally since 2008, which according to many experts is only now beginning to recover, full recovery of the Nova Scotia tourism economy cannot reasonably be expected before 2011.

2.1.1 Visits

As illustrated in Figure 1:

- Approximately 2.09 million non-resident visitors entered Nova Scotia in 2009, down approximately 115,000 or 5% from approximately 2.208 million in 2004.
- There has been essentially no change from 2004 to 2009 in the relative importance of entry type – most visitors entered by automobile (65%) or air (29%) with far smaller numbers entering by motorcoach (3%) or recreational vehicle (3%).
- All entry types declined between 2004 and 2009, with motorcoach (-42%) and

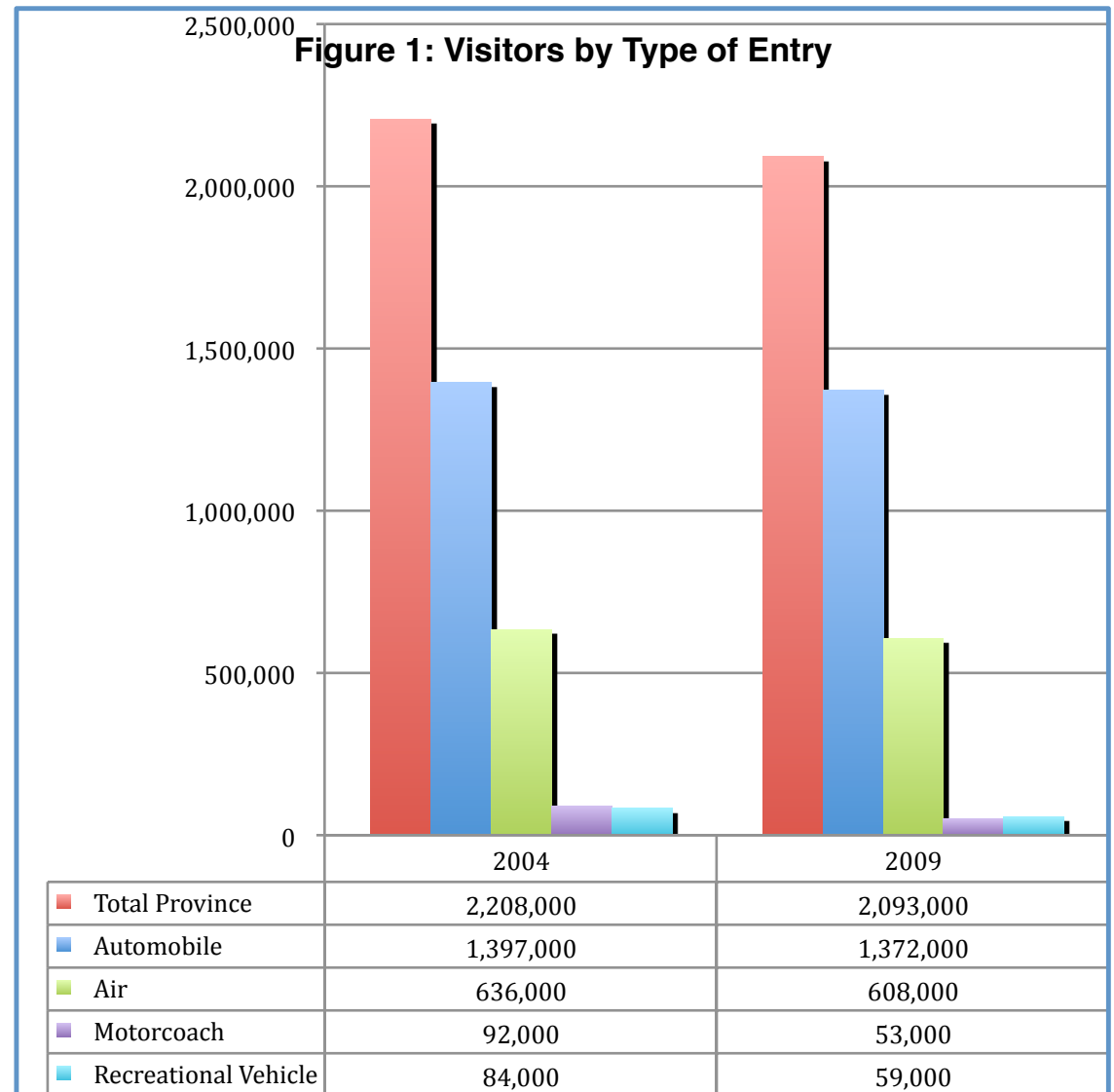
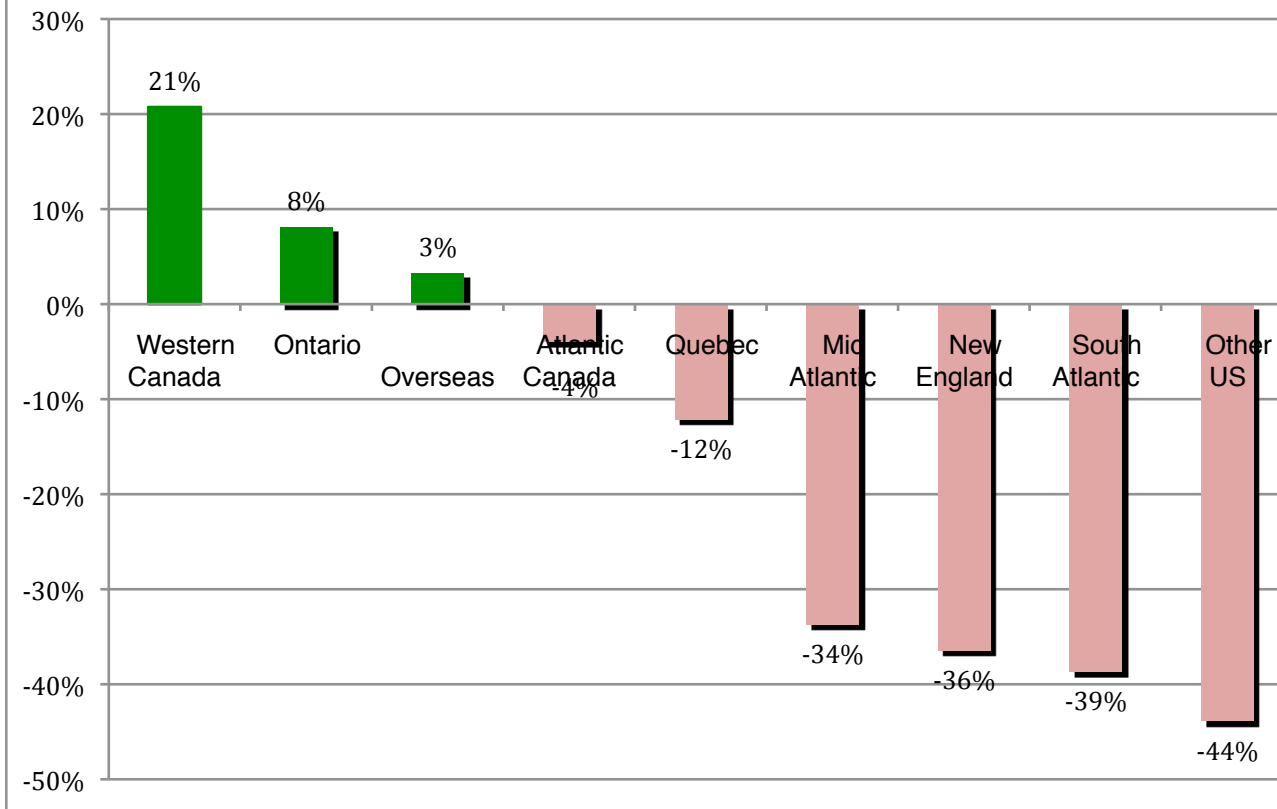


Figure 2: Change in Visitor Markets 2004-2009



Nova Scotia residents took approximately 5.7 million domestic person trips in 2006¹. Comparable numbers for more recent years are not currently available.

2.1.2 Visitor Origins

As illustrated in Figure 2, between 2004 and 2009 there was substantial variation in the performance of Nova Scotia's key visitor origin markets:

- the Western Canada market expanded 21% resulting in an increase of 25,800 visitors;
- the second largest origin market, Ontario, expanded by 8% resulting in an increase of 33,300 visitors;
- the Overseas market expanded a modest 3% resulting in an increase of 2,200 visitors;
- the largest single origin market, Atlantic Canada, contracted by 4% resulting in a loss of 47,400 visitors;

recreational vehicle (-30%) entries declining substantially, while air (-5%) and automobile (-2%) declined much less.

Not illustrated in Figure 1 is the modest recovery (7%) in non-resident visitors between 2008 and 2009, attributed to an increase of 167,000 entries by automobile and 11,000 entries by recreation vehicle.

- the Quebec market contracted by 12% resulting in a loss of 12,800 visitors; and
- all of the U.S. origin markets contracted by a combined 39% resulting in a loss of 116,500 visitors.

¹ 2007 Report Card, Nova Scotia Tourism Partnership Council, 2007

2.1.3 Accommodation

Commercial Roofed Accommodation

Between 2004 and 2008, the number of room-nights sold annually at commercial roofed accommodation in Nova Scotia fell 2% from 2.58 million to 2.52 million. This is less than the 5% drop in annual non-resident visitors, suggesting that:

- non-resident visitors to Nova Scotia increased their stays in commercial roofed accommodation and/or stayed longer in the province; and/or
- room-night sales to Nova Scotia residents travelling within the province increased during the period.

Unfortunately at this time data is not available to confirm the cause.

As a result of the increase in supply of available roofed accommodation room-nights during between 2004 and 2009, combined with the fall in non-resident visitors, annual occupancy rate fell 8% or 4 occupancy points to an annual occupancy rate of 47%.

Campgrounds

Campground businesses fared better than commercial roofed accommodation. Between 2004 and 2009, the total annual number of campsite nights sold increased by 73,000 or 9% from 769,000 to 842,000.

Given that so-called “short term” campsite night sales declined by 39,000 or 13%, it appears that longer-term campsite night sales increased substantially during the period.

In general, it is likely that non-resident visitors who used campsites were more likely to be captured in short term sales, while residents of Nova Scotia are more likely to be longer-term campers. This suggests that as with the commercial roofed accommodation, increased overnight or longer travel activities of Nova Scotia residents within the province offset the decline in non-resident overnight stays.

2.1.4 Museum Attendance

Between 2004 and 2008, total annual attendance at all Nova Scotia Museum sites (i.e. museums operated by the Province of Nova Scotia) declined 7% from 568,000 to 529,200, a loss of almost 40,000 annual visits.

The annual attendance low point was reached in 2006 at 504,400 visits, while 2007 and 2008 have shown a modest turnaround in the annual declines.

2.1.5 Visitors Counselling

Between 2004 and 2008, the total annual number of non-resident visitors counselled at provincially operated visitor information centres decreased 14% from 654,000 to 562,500, a fall of 92,000.

The low point was reached in 2006 at 499,600, followed by a substantial increase in 2007 and a levelling off in 2008.

2.1.6 Website Activity

Between 2004 and 2009, total annual visits to www.novascotia.com, the provincially operated tourism promotion website, fell 37% from 2.411 million to 1.514 million, a decrease of approximately 900,000 visits.

It is interesting to note that website visits increased in 2005 and 2006, reaching a peak of 3.075 million visits in 2006, before declining dramatically in 2007 (1.754 million) and continuing to drift down through 2008 and 2009.

2.1.7 Economic Impact

Consistent with the downward trend in most measures of tourism activity, between 2004 and 2008, the economic benefits of visits by non-resident visitors to Nova Scotia also declined:

- total annual revenues increased 1% from \$1.314 billion in 2004 to \$1.327 billion in 2008, but when adjusted for annual general price inflation of at least

12% during the period, real annual revenues have declined by as much as 11% (compared to the 5% decline in non-resident visitors);

- the total annual number of full time equivalent jobs decreased 8% from 16,200 to 14,900; and
- total annual tax revenue from tourism activity collected by all levels of government combined declined 3% from \$209 million to \$204 million – adjusted for inflation, tax revenues fell 13% to approximately \$182.1 million).

2.2 Shelburne County

2.2.1 Visits

At this time, a single comprehensive measure of the number of non-resident and resident travellers visiting Shelburne County is not available.

To derive an estimate of the number of current annual non-resident visitors to Shelburne County the consultants used a combination of the 2004 provincial visitor exit survey results and provincial statistics for the period 2004-2009. Shelburne County's 2004 share of provincial non-resident visits was applied to the provincial non-resident visits in 2009.

As illustrated in Figure 3, of the estimated 230,100 non-resident visitors who travelled in or through Shelburne County in 2009,

Figure 3: Non-Resident Visitors to Shelburne County 2004 & 2009			
Visitor Type	2004	2009	% change 2004-2009
"in or through"	242,900	230,100	-5%
"stopped"	88,300	83,700	-5%
"stayed at least 1 night"	22,100	20,900	-5%

approximately 36% or 83,700 likely stopped in the County while less than 10% or 20,900 likely stayed at least 1 night. Since 2004, the number of visitors in all categories is estimated to have declined by 5%.

In 2009 approximately 26,100 non-resident visitors entered Nova Scotia by ferry at Yarmouth². This represents 11% of the total number of “in or through” visitors to Shelburne County, suggesting that most of the visitors to the County are entering the province by other routes and means.

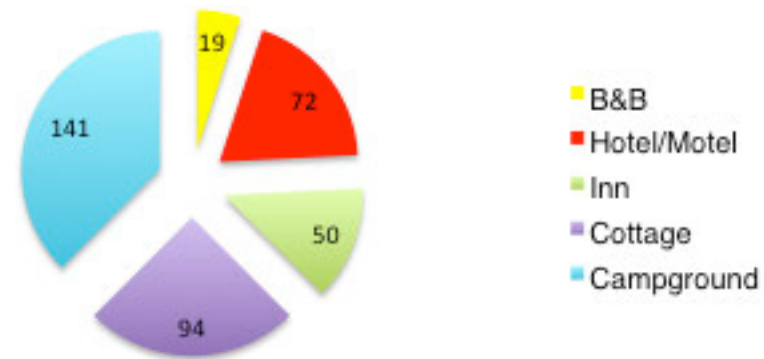
It is important to note that the Visitor Exit Survey excludes residents of Nova Scotia travelling within the province. At this time we are not aware of any measure of resident visits to Shelburne County in 2009.

2.2.2 Accommodation

The assessment of the Shelburne County commercial accommodation sector was compiled from information and reports provided by the South West Shore Development Authority (SWSDA), review of the Nova Scotia Doers' and Dreamers' 2009 Guide, on-line survey of accommodation operators (5 respondents) conducted by the consultants, fieldwork undertaken by the consultants in September and October 2009, and input from industry stakeholders attending the January 2010 stakeholders workshop.

² Source: Nova Scotia Department of Tourism, Culture & Heritage

Figure 4: Transient Accommodation Units by Type 2009

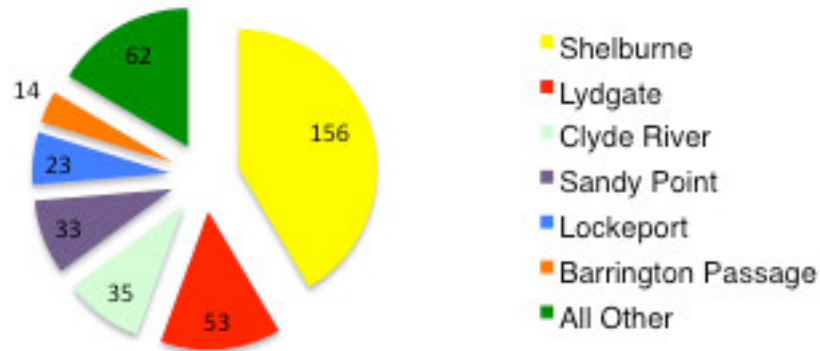


Commercial accommodation includes roofed accommodation such as hotel/motels, inns, B&Bs, and rental cottages, as well as campgrounds.

Inventory

Currently there is a total of 54 licensed commercial accommodation properties comprising 235 units in fixed roof accommodation, 141 transient or short stay campsites and 102 seasonal or long stay campsites. Figure 4 illustrates the distribution by property type (not including long stay campsites).

Figure 5: Transient Accommodation Units by Location 2009



The transient accommodation inventory is distributed among 28 communities within Shelburne County, but with the largest concentration (156 units or 40%) in the Town of Shelburne, as illustrated in Figure 5.

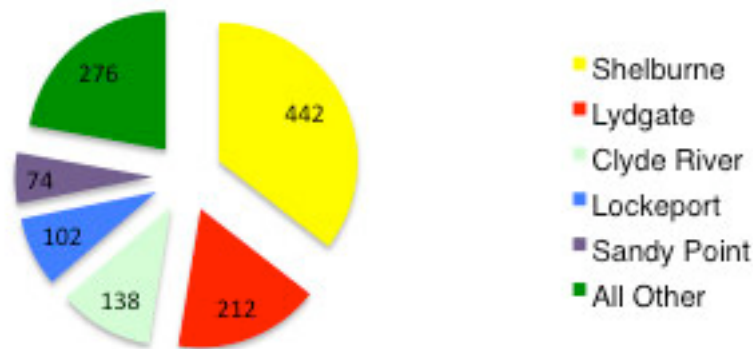
Information gathered from the on-line survey, supplemented with information provided by operators during site visits, revealed that a small number of properties (3) are considering renovations and/or expansion over the next 3-5 years, while overall minimal change in the number of properties or number of accommodation units is expected.

Capacity

During the peak season when all of the accommodation properties are open, the one night transient person capacity in Shelburne County is 1,240 persons, with 54% of this capacity in roofed accommodation (670 persons), 46% (570 persons) in short term campsites. If all of the seasonal or long stay campsites were occupied, the total one night capacity increases by 408 persons for a total of 1,648 persons.

Factoring in the season lengths for individual properties, the annual overnight transient person capacity is estimated at 311,680 person nights, with 73% of this capacity in roofed accommodation (226,800 person nights), 27% in short term campsites (84,880 person nights). If all of the seasonal or long stay campsites were occupied, the total annual

Figure 6: Transient Accommodation Person Capacity by Location 2009



overnight capacity increases by 59,160 person nights.

As illustrated in Figure 6, however, person night capacity is not as highly concentrated as the properties – only 36% in the Town of Shelburne. This is due to the influence of campgrounds with higher persons/unit (campsite) capacities than fixed roof accommodation, many of which are located outside of the Town of Shelburne.

Roofed Accommodation Occupancy

In 2009, approximately 21,500 room nights were sold in Shelburne County roofed accommodation properties, yielding a 29% annual occupancy, comparing unfavourably with the overall provincial occupancy rate of 47%. It should be noted that this includes room nights occupied by all types of travellers, including non-resident visitors and Nova Scotia resident travellers.

As illustrated in Figures 7 and 8, the number of room nights sold and annual occupancy in Shelburne County roofed accommodation have both declined substantially since 2004:

- Loss of approximately 4,000 room nights; and
- Occupancy down 8 occupancy points from approximately 37% in 2004.

It appears that the declining roofed accommodation occupancy is resulting from the overall decline in non-resident visitors to Nova Scotia, as well as a loss of competitive

Figure 7: Roofed Accommodation Annual Room Nights Sold

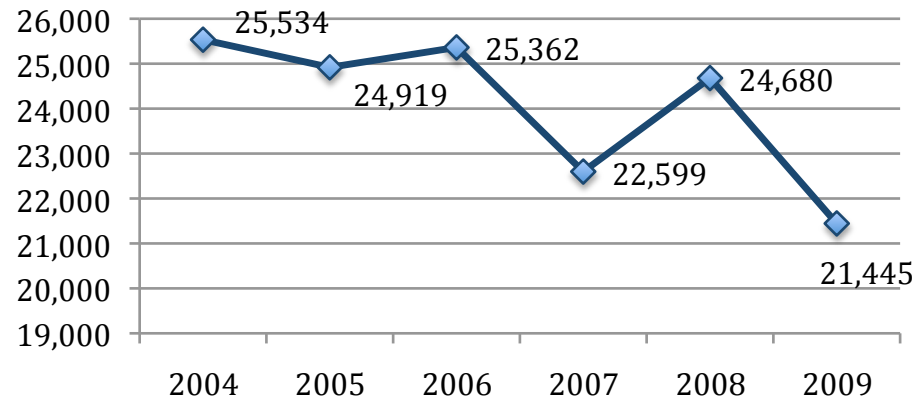
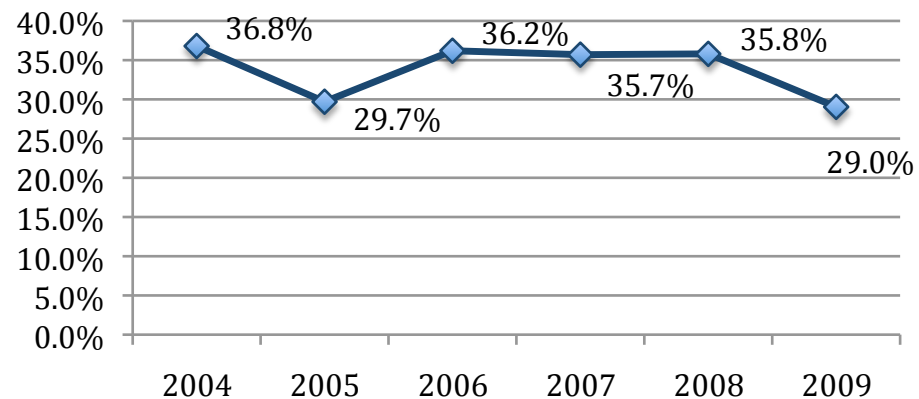


Figure 8: Roofed Accommodation Annual Occupancy



positioning for Shelburne County within the province:

- in 2009, Shelburne County's share of South Shore room nights sold was 12.2%, down from 12.6% in 2004; and
- in 2009, Shelburne County's share of Provincial room nights sold was 0.87%, down from 0.99% in 2004.

In 2009, 73% of roofed accommodation room nights were sold between May and October, yielding however only 36% occupancy during this period. The highest monthly occupancy of 46% was recorded in August – this is down from 60% August occupancy recorded in 2004.

Campground Occupancy

Separate campground occupancy data is not available for Shelburne County campgrounds – only occupancy data for all South Shore campgrounds.

In 2009, South Shore campgrounds recorded an overall combined 34% occupancy (includes seasonal and transient sites), down from 43% in 2004. This compares unfavourably with the overall provincial campground occupancy rate of 43% in 2009.

2.2.3 Attractions

The assessment of the Shelburne County attractions sector was compiled from information and reports provided by SWSDA, review of the Nova Scotia Doers' and Dreamers' 2009 Guide, on-line survey of attraction operators (12 respondents), fieldwork undertaken by the consultants in

September and October 2009, and input from industry stakeholders attending the January 2010 stakeholders workshop.

This sector of the tourism economy shows strong resource potential for growth and development, which is essential if Shelburne County is to attract more visitors to the region and for longer stays. For pleasure travellers, attractions are the “things to see and do” and are typically the primary factors influencing the choice of travel destination.

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

In 2009 there were 36 attractions listed for Shelburne County in the Doers' and Dreamers' provincial guide, including:

- 16 museums/heritage centres;
- 6 walking trails (totaling 17.3 km, longest 4 km);
- 3 festivals/events;
- 3 Provincial Parks (1 camping, 2 day use);
- 2 recreation facilities (golf);
- 1 performing arts facility;
- 1 kayak rental business;
- 1 birding tour operator;

- 1 sightseeing tour operator;
- 1 historic site; and
- 1 beach.

Review of available in-market guides and brochures augmented with fieldwork undertaken by the consultants revealed an additional 130 “market ready” attractions, where market ready is defined as open for and seeking to attract business/visitors. These include:

- 35 canoe/kayak opportunities (31 kayak entry locations, 3 canoe rentals, 1 kayak rental);
- 20 festivals/events;
- 15 beaches;
- 13 lighthouses and 1 lighthouse museum;
- 6 recreation facilities;
- 5 birding (4 sites, 1 guided tour);
- 5 bowling facilities;
- 5 trails (4 walking, 1 multi-use);
- 5 bicycling (5 routes, 1 rental);
- 4 historic sites;
- 4 libraries;
- 3 sightseeing (1 driving route, 1 guided land tour, 1 guided boat tour);
- 3 museum/heritage centres; and
- equestrian facilities/programs (2), fitness centres (2), marina/yacht club (1 each), diving, billiards, movie theatre.

Key characteristics of the attraction inventory include the following:

- 113 are open or available for use year round – most of these are natural heritage attractions or sites (beaches, birding, kayak launching sites, trails) with use subject to weather conditions;
- 47 open at least part of the time between May and October – most of these are built attractions and festivals/events;
- 6 occur between December and February (festivals/events);
- 1 open November through March (curling rink);
- 1 open by appointment only (historical society);
- Sport facilities to host regional competitions are limited in number and size;
- Meeting facilities to host conferences, workshops, and seminars are limited in number and size to community halls located in many communities that are capable of hosting small to medium size (up to 100 person) conferences, workshops and seminars;
- New/existing attractions under development include -- Black Loyalist Interpretive Centre, multi-use trails, Lockeport Loop;

- vibrant Re-enactors group;
- ongoing expansion and upgrading of existing multi-use trails as well as development of new trails within the County; and
- Geographically, the listed and unlisted attractions are dispersed throughout Shelburne County, with the heaviest concentration of built attractions in and around the town of Shelburne.

Also of note is the Town of Shelburne's popularity as a location for the filming of "period" films (late 1700's to mid 1800's) as evidenced by the filming in September of some scenes from an upcoming remake of Moby Dick.

This sector can be characterized as diversified but offering primarily "while in the area" type attractions with generally low visitation. Attendance at any built attraction is less than 5,000 visitors annually.

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

- Black and White Loyalist settlers;
- Other early settlement and pioneers;
- boat and ship building history;
- Commercial fishing industry; and
- UFO's (Shag Harbour incident).

2.2.4 Food & Beverage

The assessment of the Shelburne County food and beverage sector was compiled from information and reports provided by SWSDA, review of the Nova Scotia Doers' and Dreamers' 2009 Guide, fieldwork undertaken by the consultants in September and October 2009, and input from industry stakeholders attending the January 2010 stakeholders workshop.

Typically this is the most volatile sector of a tourism economy, and often in flux. It responds quickly to recovery and growth in visits and length of stay, but rarely is a driver.

Currently there is a total of 38 food & beverage operations – 1 (Charlotte Lane) is listed in the Doers' & Dreamers' 2009 Guide.

There are a small number (3) of highly regarded "culinary experiences", however the inventory is more heavily weighted to family style and fast food restaurants, including:

- 16 restaurants;
- 14 restaurant/fast food;
- 2 cafes;
- 2 pub/lounge; and
- 1 ice cream shop.

There is at least one operation in each of 8 communities, with:

- concentrations in Barrington Passage (14 or 37%) and Town of Shelburne (14 or 37%); and
- others in Lockeport (3), Cape Sable Island (2), Clyde River, Sable River (2), East Green Harbour (1), Woods Harbour (1).

A substantial number are seasonal operations or at least operate on reduced hours outside of the peak May to October period, while many operate with limited hours even during the May to October period.

2.2.5 Tourist Retail

The assessment of the Shelburne County tourist retail sector was compiled from information and reports provided by SWSDA, fieldwork undertaken by the consultants in September and October 2009, and input from industry stakeholders attending the January 2010 stakeholders workshop.

The breadth and robustness of the tourist retail sector is often an indicator of the overall health of a region's tourism economy, but like food and beverage it is rarely a driver. Currently this sector is languishing in Shelburne County – neither expanding nor contracting substantially.

There are a total of 26 “tourist-oriented” retail operations in Shelburne County – 1 (Osprey Arts Centre) is listed in the Doers' & Dreamers' 2009 Guide. The others include:

- 7 crafts/hobbies;

- 4 artisan co-op/studio;
- 4 gift/specialty shop;
- 3 art galleries;
- 2 books & collectibles;
- 2 canoe sales;
- 2 original art; and
- 1 antiques/collectibles, 1 leather crafts.

The shopping opportunities are distributed among 14 communities -- 11 (42%) in Shelburne; 2 each in Lockeport & Port La Tour; and 1 each in Barrington, Barrington Passage, Churchover, Clark's Harbour, Clyde River, Little Harbour, Newelton, North East Point, Port L'Hebert, Sable River and Sandy Point.

2.2.6 Transportation

The assessment of the Shelburne County transportation sector was compiled from information and reports provided by SWSDA, fieldwork undertaken by the consultants in September and October 2009, and input from industry stakeholders attending the January 2010 stakeholders workshop.

Transportation links with New England through the ferry terminal in Yarmouth have traditionally been an important element supporting the tourism economy of Shelburne County given its relatively “remote” location relative to the primary gateways in Nova Scotia. Since 2005 the ferry service has

eroded and tourism has been negatively affected. At the time of this report, the service has been suspended for the 2010 season without any indication of when or if it will be reinstated.

The primary modes of transportation to/from Shelburne County are personal automobiles. There is limited scheduled bus service between Shelburne and Halifax but no passenger (or freight) rail service.

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

2.2.7 Marketing

The assessment of Shelburne County tourism marketing activity was compiled from information and reports provided by Discover Shelburne County Tourism Association, as well as visits to Shelburne County Visitor Information Centres (4), interviews with industry stakeholders, and internet research undertaken by the consultants in September, October and November 2009. The four elements of tourism destination marketing were examined: research and planning; product development; advertising and promotion; and sales.

Since the Tourism Development Coordinator position was established and filled in September 2009, significant resources have been invested and numerous advances have

been made to enhance the region's destination marketing.

Research & Planning

The Shelburne County Tourism Development Plan is the first County-wide tourism research and planning initiative undertaken in the County. To date, minimal market research, both visitor tracking (visitor numbers, spending, visitor characteristics, visitor intentions, visit characteristics) and advertising tracking (response rates, fulfillment rates, return on investment) has occurred on a County-wide basis.

Some visitor and visit tracking data collected by the province (2004 Exit Survey) is available for Shelburne County, but with the exception of accommodation occupancy, is dated.

Attendance numbers for the Visitor Information Centres and many of the built attractions is captured annually.

Product Development

To date product development, including upgrading and expansion of existing attractions, and establishment of new visitor experiences, has occurred primarily at the local community-level. Little or no county-wide coordination or linking of visitor experiences has occurred.

Advertising & Promotion

Discover Shelburne County Tourism Association is the County's official destination

marketing organization (DMO) supported with contributions from each of the five municipalities. Its marketing activities include:

- website (www.discovershelburnecounty.com) which is currently being expanded and updated;
- coordination of Shelburne County material for the provincial Doers' and Dreamers' Guide;
- map, visitor guide, and brochures distributed through Visitor Information Centres within Shelburne County, as well as provincially supported Visitor Information Centres throughout Nova Scotia; and
- participation in selected Provincial and Destination South West Nova marketing programs.

Other organizations within Shelburne County also contribute to destination marketing including:

- Municipality of Barrington – visitor map/brochure, website (www.barringtonmunicipality.com);
- Shelburne & Area Chamber of Commerce – visitor map/brochure;
- Town of Clark's Harbour – visitor map/brochure; website (www.clarksharbour.com);
- Shelburne Historical Society – website (www.historicshelburne.com); and

- Cape Sable Historical Society -- website (www.capesablehistoricalsociety.com).

Within Shelburne County, a number of private/commercial interests are contributing to destination marketing including:

- Historic Shelburne website – www.shelburnenovascotia.com
- Explore Shelburne County website – www.exploreshelburnecounty.ca

Outside of Shelburne County, organizations undertaking destination marketing activities benefiting the County include:

- Nova Scotia Department of Tourism, Culture and Heritage – Doers' and Dreamers' Guide, product/experience brochures and guides, website (www.novascotia.com);
- Destination Southwest Nova – visitor guide, brochures, website (www.destinationsouthwestnova.com); and
- Nova-Scotia-Vacation-Guide – website (www.nova-scotia-vacation-guide.com).

In 2009 and the early part of 2010 the Tourism Development Coordinators³ have undertaken a number of advertising and promotion activities, including but not necessarily limited to:

³ Activities initiated by Jeff Spencer the first Coordinator; continued and expanded by current Coordinator Suzy Atwood.

- the initiation of a blog authored by the Tourism Development Coordinator;
- the launching of a Facebook fan page for Shelburne County; and
- Initiative to place all Shelburne County tourism businesses and operations on Google Maps.

Sales

There are four Visitor Information Centres located within the County of Shelburne – Barrington, Clark's Harbour, Lockeport and Shelburne – all of which operate seasonally (May-October). While the CAT ferry to and from Yarmouth was operating, a provincially operated trip counseling service was provided on board.

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

2.3 Opportunities & Issues

Shelburne County has a number of competitive strengths and assets that present opportunities for growing tourism in the region, including but not necessarily limited to:

- Compelling natural heritage resources including seacoast and beaches, rivers, forests & woodlands, bird habitat, harbours (particularly Shelburne Harbour), and Cape Sable Island.

- Variety of cultural heritage interpretive themes as the basis for compelling stories including Loyalist settlement history (Black and White Loyalists), boat & shipbuilding (Cape Islander, Dorys, Longboats), lobster fishery, Shag Harbour UFO incident, Sikh landing, Port LaTour (Charles LaTour).
- Attraction enhancement/development opportunities such as beaches, birding, kayaking, Historic Dock Street, Black Loyalists and Re-enactors.
- Diverse landscapes within the region – from rural to urban, agricultural to forest, seacoast to inland lakes and rivers.
- All of the Nova Scotia tourism icons are present in Shelburne County – seacoast, lighthouses, beaches, fishing villages, music, seafood, art and culture, rural landscapes, forests.
- The healthiest lobster fishery in Atlantic Canada.
- Temperate climate.
- Leveraged marketing access to origin markets through Destination South West Nova and Provincial marketing programs.
- Increasing importance and use of the Internet and the World Wide Web for travel planning and purchases which substantially reduces the costs and barriers to marketing in origin markets.

- Newly established Tourism Development Coordinator position providing dedicated (albeit limited) resources for tourism development.
- Extensive road network within Shelburne County, although some sections would benefit from improvement/upgrading.
- Network of strategically located, well-equipped and operated visitor information centres.
- Substantial unused accommodation capacity year-round, including during peak June-September period.

The key issues that need to be addressed for Shelburne County's tourism economy to grow and expand include, but are not necessarily limited to:

- Moving beyond the early stage destination development infrastructure that is currently in place.
 - Attractions – lack of packaged experiences and widely recognized travel generators;
 - Accommodation -- lack mid-size and large hotels, and resorts;
 - Retail – limited number and variety of tourist oriented shopping opportunities; lack of geographic concentration/cluster; and
 - Transportation – sections of Highway 103 require improvement and upgrading; lack

of public transportation to and within Shelburne County; uncertain future for ferry service into Yarmouth from the Northeastern U.S.

- Shelburne County visitor map and visitor guide require improvement.
- Outside of the 4 Visitor Information Centres, limited distribution within the County of Individual tourism business brochures.
- Lack of coordination in product development and marketing communications among tourism industry stakeholders.
- Lack of current, comprehensive visitor and visit data for Shelburne County.
- In the short term at least, many barriers to travel:
 - weak global economy and rising fuel costs;
 - Western Hemisphere Travel Initiative; and
 - Global health issues.
- Many strong intervening opportunities for visitors arriving by land to Nova Scotia, particularly immediately to the east within the South Shore region.

3. Destination Development Plan

3.1 Goal & Objectives

As stated in the Request for Proposals:

*“The **goal** [for the Shelburne County Tourism Development Plan] is to create a long-term destination development plan for **increasing tourism** in Shelburne County.”⁴*

This goal is supported by a number of objectives to be achieved over the next five years, including:

- to raise the level of awareness among potential visitors – both Nova Scotia residents and non-resident visitors – of Shelburne County as a desirable travel destination or place to visit;
- to enhance the quality of the travel experience offered to visitors in Shelburne County;
- to increase the typical length of time visitors stay in Shelburne County; and
- to increase the total amount of tourism generated revenues in the Shelburne County economy.

3.2 Vision

Through implementation of the recommendations contained in this plan, industry stakeholders foresee a future for Shelburne County as a part of Nova Scotia:

- that residents of Nova Scotia and non-resident visitors **choose to travel to** and visit primarily for **leisure and recreation**;
- that offers visitors a rich tapestry of travel experiences grounded in the County’s **natural and cultural heritage**;
- where tourism is **embraced and supported by residents** as a key component of the local economy; and
- where the **economic, environmental and social benefits** of tourism development are substantially greater than the costs.

3.3 Markets

3.3.1 Trip Length

It is recommended that Shelburne County pursue both day trip and overnight or longer stay visitors.

Although counts of current day trip visits and visitors during each of the four seasons are not available, the consensus among tourism industry stakeholders is that substantial room

⁴ pg. 1, [Request for Proposals: Tourism Destination Development Plan for Shelburne County](#), South West Shore Development Authority, November 2009

for growth in number of visits exists in all four seasons. To ensure that the quality of visitor experience, and the quality of life for residents does not diminish, it will be important to monitor “crowding” in critical areas and take steps to manage demand when crowding occurs.

Measurement areas include:

- parking at attractions and along commercial and residential streets in towns and villages;
- seats in restaurants;
- attendance at festivals and events; and
- traffic along arterial roads.

Based on the current level of occupancy reported by commercial accommodation properties (29% for roofed accommodation; 34% for campgrounds) and the estimated accommodation capacity (416,600 person nights for roofed accommodation and campgrounds combined), it is estimated that there is **room to accommodate an additional 288,555 person nights annually**. More than half this unused capacity is available between May and October.

3.3.2 Geographic Origins

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

Non-Resident Visitors

All of the visitors travelling to the province by automobile, motorcoach or recreational vehicle represent potential visitors for Shelburne County. Given the region’s distance from the province’s tourism hub in Halifax (approximately 2 hours drive), both day trip and overnight or longer stay visitors hold potential.

Resident Visitors

Residents in the province take a total of 5.7 million domestic person trips per year and hence represent a substantial market, larger in fact than the current non-resident visitor market⁵. Many of these potential visitors live in and around Halifax with its population of 370,000.

There is a need to generate awareness and interest among Nova Scotia residents – Haligonians in particular – in visiting Shelburne County for day trips and overnight or longer trips.

3.3.3 Ideal Visitors 2010-2014

Shelburne County welcomes and will continue to welcome visitors who are travelling to visit friends and relatives, for pleasure, on business and for personal reasons. In other words, the

⁵ 2007 Report Card, Nova Scotia Tourism Partnership Council, 2007

full range of travellers to and within Nova Scotia. None will be turned away.

Given the limited resources available to support destination development in Shelburne County, however, this plan focuses on attracting ideal visitors, which is a subset of all possible visitors.

Ideal visitors are those whose needs, interests and preferences match well with the visitor experiences Shelburne County offers now and can reasonably expect to develop and offer over the next 5 years.

Beach Combing

Data are not currently available to estimate the number of visitors who engage in beach combing in Shelburne County. Yet, based on anecdotal evidence such as observations of industry stakeholders and written comments at visitor information centres within the County, there is reason to believe this visitor type is currently attracted to Shelburne County and its 15 beaches.

The 2004 Nova Scotia Visitor Exit Survey reported “going to an ocean beach for exploring or beach combing” as the sixth most popular activity, with 33% of non-resident visitors participating in this activity while visiting Nova Scotia. If the participation rate remained unchanged between 2004 and 2009, approximately 693,000 non-resident visitors (33% of 2.1 million non-resident visitors) participated in this activity in 2009. The overall

market size would be larger with the addition of Nova Scotia resident travellers.

To capitalize on the opportunities provided by beach combers travelling to and around Nova Scotia, **it is recommended that the Shelburne County Tourism Development Committee (SCTDC):**

- Establish and lead a task force of municipal representatives and tourism industry stakeholders to undertake a review of the County’s beaches. The purpose of the review would be to:
 - identify which beaches the County wishes to promote for more intensive use by visitors;
 - identify all obstacles to increased use of each beach and determine which if any beaches should not be promoted for more intensive use by visitors; and
 - identify and recommend enhancement and upgrades to visitor support services and facilities such as way finding signs, parking, public washrooms, picnic areas, interpretive panels/signs, etc. at beaches selected for more intensive use by visitors.
- Feature those beaches selected for more intensive visitor use, and their beach combing opportunities, in “on-line” (Internet) tourism marketing activities as well as on a comprehensive Shelburne County Visitor

Map (see recommendation in Section 3.4.2, Marketing Communications, below).

Birding

Data are not currently available to estimate the number of visitors who engage in birding in Shelburne County. Yet, based on anecdotal evidence such as observations of industry stakeholders and written comments at visitor information centres within the County, there is reason to believe that this visitor type is also currently attracted to Shelburne County and its birding opportunities such as the Hawk and Daniels Head on Cape Sable Island, a provincially designated Important Birding Area (IBA). In addition, at least one Shelburne County private sector tour operator currently offers 2-5 day guided birding tours.

The 2004 Nova Scotia Visitor Exit Survey reported that 15% of non-resident visitors participated in “birding” while visiting Nova Scotia. If the participation rate remained unchanged between 2004 and 2009, approximately 315,000 non-resident visitors (15% of 2.1 million non-resident visitors) participated in this activity in 2009. The overall market size would be larger with the addition of Nova Scotia resident travellers.

To capitalize on the opportunities provided by birders travelling to and around Nova Scotia, **it is recommended that the SCTDC:**

- Feature birding areas and opportunities in “on-line tourism” marketing activities as well as on a comprehensive Shelburne County

Visitor Map (see recommendation in Section 3.4.2, Marketing Communications, below).

- Encourage, support and facilitate the establishment and operation of an environmental interpretive centre on Cape Sable Island to provide new services and facilities for birders (see recommendation in Section 3.7.2, below)

Cultural Heritage Discovery

If there are iconic images of Shelburne County that resonate with resident and non-resident visitors once they have visited, it would be the Black Loyalist settlement heritage of Birchtown and the White Loyalist settlement heritage of the Town of Shelburne, both of which have been recorded in popular books⁶, and are currently interpreted at heritage sites and in heritage buildings and museums.

Based on anecdotal evidence such as observations of industry stakeholders and written comments at visitor information centres within the County, as well as visitor attendance data collected by some museums, this visitor type is currently attracted to Shelburne County and its cultural heritage discovery experiences.

The 2004 Nova Scotia Visitor Exit Survey reported:

⁶ The Book of Negroes by Lawrence Hill; Loyalists and Layabouts by Stephen Kimber; and others

- visits to “national or provincial historic sites” as the fourth most popular activity, with 39% of non-resident visitors participating in this activity while visiting Nova Scotia;
- “visiting museums” as the fifth most popular activity, with 36% of non-resident visitors participating in this activity while visiting Nova Scotia; and
- “experiencing Nova Scotia’s culture and heritage” as the fifth most enjoyed aspect of non-resident visitors’ trips to Nova Scotia, with 7% of all non-resident visitors mentioning this.

If the participation rates remained unchanged between 2004 and 2009, approximately 819,000 non-resident visitors (39% of 2.1 million non-resident visitors) visited national or historic sites, and 756,000 (36% of 2.1 million non-resident visitors) visited museums in 2009. The overall market size would be larger with the addition of Nova Scotia resident travellers.

To capitalize on the opportunities provided by visitors interested in discovering cultural heritage travelling to and around Nova Scotia, **it is recommended that the SCTDC:**

- Encourage, support and facilitate the preservation and, where opportunities arise, the restoration of heritage buildings in the Town of Shelburne, particularly along Historic Dock Street;

- Feature cultural heritage sites and attractions in “on-line” tourism marketing activities as well as on a comprehensive Shelburne County Visitor Map (see recommendation in Section 3.4.2, Marketing Communications, below); and
- Encourage, support and facilitate the development of a Shelburne Outdoor Historical Theatre Festival as a new event attraction (see recommendation in Section 3.5.1, Shelburne Outdoor Historical Festival, below);

Genealogical Research

Shelburne County’s Black and White Loyalist settlement history and accessible archives combined with the apparent popularity of genealogical research or tracing family trees (3.35 million monthly searches worldwide on Google using search terms “family tree”, 2.74 million using “ancestry”, 1.2 million using “family history” and 1,000 using “genealogy travel”) represents an opportunity to attract visitors travelling for genealogical research purposes.

Even though there are no counts of the number of visitors to Shelburne County that are travelling for genealogical research purposes, based on anecdotal evidence such as observations of industry stakeholders and written comments at visitor information centres within the County, this visitor type is currently attracted to the County and its genealogical research experiences.

The 2004 Nova Scotia Visitor Exit Survey reported 4% of visits to Nova Scotia were to “research family history”. If the participation rate remained unchanged between 2004 and 2009, approximately 84,000 non-resident visitors (4% of 2.1 million non-resident visitors) engaged in family tree research while visiting Nova Scotia in 2009. The overall market size would be larger with the addition of Nova Scotia resident travellers doing the same.

To capitalize on the opportunities provided by visitors travelling to and in Nova Scotia who are interested in genealogical research, **it is recommended that the SCTDC:**

- Encourage, support and facilitate groups and organizations interested in providing access for the public to genealogical resources and archives in Shelburne County; and
- Feature genealogical research resources and sites in “on-line” tourism marketing activities as well as on a comprehensive Shelburne County Visitor Map (see recommendation in Section 3.4.2, Marketing Communications, below);

Geocaching

Often described as a high tech treasure hunt, geocaching or using a global positioning system (GPS) device to locate a “cache” established somewhere in the world by an individual, group or organization has become an immensely popular leisure time activity since it began in May 2000. On March 10,

2010, the self appointed “Official Global GPS Cache Hunt Site” www.geocaching.com reported that there were 1,002,529 active geocaches and an estimated 3-4 million geocachers worldwide. It also noted that in the previous 30 days, 2.3 million geocache sites were visited and logged (or recorded).

Within an 80 km. radius of McNutt Island, there are currently more than 900 geocaches listed on www.geocaching.com, with some established as recently as February 21, 2010.

Although there are no data identifying the number of visitors to Shelburne County that have been drawn by the lure of locating a geocache, given the estimated number of global geocachers and the number of active geocache sites in Shelburne County it seems apparent that it is a very popular activity. The lure of locating and “logging” or reporting the finding of a cache is a powerful travel motivator for geocache enthusiasts, much as travelling to see and record a particular bird is for birders.

The www.geocaching.com website describes the profile of geocachers as: “First started by technology and GPS enthusiasts, the ranks of geocachers now include couples, families and groups from all walks of life.”

To capitalize on the opportunities provided by visitors interested in geocaching in Shelburne County, **it is recommended that the SCTDC:**

- Encourage, support and facilitate groups and organizations within the County that are

interested in organizing and hosting geocaching events; and

- Feature Shelburne County geocaching resources and cache locations in “on-line” tourism marketing activities;

Nature Art

There are two factors that position Shelburne County as an ideal location for visitors interested in creating nature art (photography, drawing/sketching/painting, etc.):

- A virtually unlimited number of publicly accessible sites and locations suitable for engaging in the activity; and
- The generally slower pace of activity and lack of crowding within the County that is conducive to creating nature art.

Visitors who create nature art would range from amateurs and hobbyists to professionals.

Based on anecdotal evidence such as observations of industry stakeholders and written comments at visitor information centres within the County, this visitor type is currently attracted to Shelburne County to create nature art. However, data are not currently available to estimate the number of visitors who engage in genealogical research in Shelburne County.

As available sources of visitor data do not identify creating nature art as a distinct activity, the size of the market can only be inferred from the size of the market for related activities.

The 2004 Nova Scotia Visitor Exit Survey reported:

- participation in “nature observation” as the third most popular activity, with 44% of non-resident visitors participating in this activity while visiting Nova Scotia; and
- of the aspects of trips to Nova Scotia most enjoyed, “general scenery/sightseeing” ranked first with 53% of visitors mentioning it, “coastal scenery” was third with 32% mentions, and “nature viewing” was fifth with 9% mentions.

If the participation rates remained unchanged between 2004 and 2009, approximately 924,000 non-resident visitors (44% of 2.1 million non-resident visitors) participated in nature observation, in 2009. The overall market size would be larger with the addition of Nova Scotia resident travellers.

To capitalize on the opportunities provided by visitors interested in creating nature art in Shelburne County, **it is recommended that the SCTDC:**

- In collaboration with local nature photographers and nature artists, investigate the feasibility of developing a multi-day program for visitors interested in learning about and/or practicing nature art in Shelburne County;
- Encourage, support and facilitate the creation and publication, “on-line” and in map/brochure form, of an inventory of top

sites and locations for creating nature art;
and

- Feature the creation of nature art as a Shelburne County activity in “on-line” tourism marketing activities.

Personal retreat

Personal retreats as a motivation for travel can include everything from a weekend or long weekend “away” to unwind and relax in a less hectic environment, to multi-day structured programs in meditation, religious contemplation and/or stress management to name just a few program topics.

With the absence of any purpose built personal retreat facilities or structured programs in Shelburne County, it is impossible to determine the extent to which current visitors to the County are on personal retreats. However, the generally tranquil, relaxed atmosphere of much of the County and the availability of commercial accommodation including rental cottages in secluded locations within the County create the necessary conditions for this type of visitor experience.

To capitalize on the opportunities in the County to attract visitors seeking personal retreats, **it is recommended that the SCTDC:**

- Encourage, support and facilitate the creation and publication, “on-line” and in map/brochure form, of information about specific commercial accommodation and

rental properties suitable for hosting personal retreats; and

- Feature personal retreats and the favourable conditions for these as a Shelburne County visitor experience in “on-line” tourism marketing activities.

Paddling

Shelburne County currently offers high quality paddling opportunities, both sea kayaking and smooth water canoeing or paddling, including:

- 31 identified locations for launching sea kayaks within its boundaries;
- extensive coastal shoreline featuring bays, coves, harbours, lighthouses (at least 14), river outlets and other interesting features to explore by sea kayak or canoe;
- extensive network of accessible rivers and freshwater lakes; and
- at least 3 businesses within the County that rent canoes and 2 that rent sea kayaks for day and overnight or longer use.

Based on anecdotal evidence such as observations of industry stakeholders and written comments at visitor information centres within the County, paddlers are currently attracted to Shelburne County and its paddling opportunities. However, data are not currently available to estimate the number of visitors who engage in paddling in Shelburne County.

As for the size of the potential market:

- The 2004 Nova Scotia Visitor Exit Survey reported that 2% of visitors to Nova Scotia participated in freshwater canoeing/kayaking, while 1% participated in sea kayaking. If the participation rates remained unchanged between 2004 and 2009, approximately 6,300 non-resident visitors (2% + 1% of 2.1 million non-resident visitors) participated in paddling in 2009. The overall market size would be larger with the addition of Nova Scotia resident travellers.
- The 2006 Canadian Travel Activities and Motivations Survey (TAMS) reported that while on out-of-town or overnight trips of one or more nights in 2005 or 2006:
 - 8.9% of adult Canadians (2.2 million) engaged in freshwater canoeing or kayaking;
 - 3.0% of adult Canadians (742,000) engaged in ocean kayaking or canoeing; and
 - 3.9% of adult U.S. population (8.5 million) engaged in freshwater canoeing or kayaking

To capitalize on the opportunities in the County to attract paddlers, **it is recommended that the SCTDC:**

- Encourage, support and facilitate groups and organizations within the County that are interested in organizing and hosting paddling events;

- In collaboration with local accommodation and canoe/kayak rental businesses, investigate the feasibility of developing multi-day packages for paddlers that could include guided paddling trips and excursions; and
- Feature Shelburne County paddling opportunities, experiences, facilities and services in “on-line tourism” marketing activities.

Seafood dining

Although Shelburne County is regarded as having one of, if not the best, lobster fisheries in Nova Scotia, opportunities for dining on fresh lobster in Shelburne County are not plentiful. The reasons for this are not obvious, although the timing of the lobster fishing season (November through May) does not coincide with the peak visitor season (June through September) and this may be a factor.

Nonetheless, dining on fresh seafood and particularly lobster are an iconic Nova Scotia experience that visitors to Shelburne County expect to enjoy.

To capitalize on the tourism opportunities related to the lobster fishery, **it is recommended that the SCTDC:**

- In collaboration with tourism industry stakeholders and interested lobster fisherman, investigate the feasibility of expanding and shifting the current lobster festival to the peak summer season; and

- Feature Shelburne County dining locations that provide fresh seafood particularly lobster, in “on-line” tourism marketing activities.

Touring

Touring – travelling from site to site within a destination, or from destination to destination, for the purpose of seeing and sampling local natural and cultural heritage – is one of the primary tourism activities within North America, including Nova Scotia. Within the United States, the popularity of auto-touring (including RVs and motorcycles) led to the establishment of the National Scenic Byways program.

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

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

- Acadian Byway in Maine (www.byways.org/explore/byways/13791);

- Amish Country Byway in Pennsylvania (www.byways.org/explore/byways/13793);
- Billy the Kid Trail in New Mexico (www.byways.org/explore/byways/2062); and
- Selma to Montgomery March Byway in Alabama (www.byways.org/explore/byways/2050).

Every roadway that is designated an All-American Road or a National Scenic Byway must possess outstanding qualities from one or more of the following six intrinsic characteristics⁷:

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

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

⁷ National Scenic Byways Program - Intrinsic Quality Handbook: A Community Guide to Inventorying and Evaluating Scenic Byways, National Park Service & Federal Highway Administration, 1996

travellers who chose to travel the byways are motivated by a combination of these same intrinsic values located within the corridor.⁸ For marketing purposes these intrinsic values and attributes also provide a means to develop theming and a story line for the roadway. This is essentially how an overall touring experience can be created for the visitor, and in turn how the roadway can become a destination attraction, rather than simply functioning as a travel corridor.

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

Given that 65% of all Nova Scotia visitors entered the province by automobile in 2009⁹, it is apparent that an opportunity exists for Shelburne County to attract auto-touring visitors from all of the province's key markets.

The 2006 TAMS database provides some useful insights into the auto touring market. Based on a profile of those American and Canadian overnight travellers that had taken a self guided overnight tour staying in different

locations during 2005 and 2006 (a large proportion of which are likely to be by auto) there are significant numbers in Atlantic Canada¹⁰:

- Overall this segment represents 17% of all Canadian travellers and 10% of US travellers;
- 185,000 in Atlantic Canada with close to 20% in Halifax;
- Large numbers in Quebec particularly in Montreal (1,049,507 – 29% of total in Canada); and
- Large numbers in Ontario particularly in Toronto (1,202,011 – 34% of total in Canada).

Some of the activities this market is interested in while on a touring trip include¹¹:

- Sunbathing and swimming in lakes or the ocean;
- Hiking – same day excursions;
- Visiting nature parks – national, provincial etc.;
- Visiting museums;
- Strolling around a city for its architecture and buildings;

⁸ Scenic Byway Development on the Oregon Coast: Economic Benefits and User Preferences, 1990; final case study for the National Scenic Byways Study – New Hampshire Scenic Byways: Economic Benefits, 1990.

⁹ Nova Scotia Department of Tourism, Culture & Heritage

¹⁰ Custom data analysis of Travel Activities and Motivation Survey database, commissioned by the Tourism Company, 2008

¹¹ Ibid

- Visiting known historic sites;
- Dining in local food restaurants; and
- Staying in lakeside or riverside resorts, seaside resorts or public campgrounds.

With the exception of lakeside, riverside or seaside resorts, all of these are activities offered in Shelburne County.

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

To capitalize on the auto-touring opportunities, **it is recommended that the SCTDC:**

- Establish and lead a tourism industry working group to develop a plan for a network of auto-touring experiences, modelled on the U.S. National Scenic Byway Program. In concept the network would resemble a hiking trail network in a national or provincial park, featuring a few arterial or main routes and a series of loops (such as the Lockeport Loop) that connect to/from the main routes.
- Once the auto-touring network plan is complete, encourage, support and facilitate the formation of working groups of tourism industry stakeholders for each route or byway to lead and coordinate the development and implementation of each route. Beyond mapping, developing interpretative materials, and signing a route, the working groups would engage with tourism operators to begin offering a range of tour options and add-on tours options such as boat tour connections.
- Once the auto-touring network plan is complete, encourage, support and facilitate research into the feasibility of developing and implementing touring experience enhancements including, but not necessarily limited to:
 - Use of hi-tech interpretation enhancements such as GPS linked CDs or MP3s for use in autos or on iPods and MP3 players; and
 - Environmentally sustainable touring options such as bicycle, smart car and hybrid car rentals.
- In partnership with Yarmouth and Acadian Shores, engage with the province to develop and promote the concept of a Nova Scotia Circle Tour as a key to attracting Nova Scotia visitors who enter the province by automobile via New Brunswick, or by air via Halifax, to travel to Shelburne County for auto-touring experiences. This province wide route could be modelled on the

Ontario/Michigan Lake Superior Circle Tour
(www.lakesuperiorcircuitour.com).

3.4 Marketing

3.4.1 Research & Planning

The research undertaken for this plan has underscored the need for better market intelligence to guide industry development and marketing activities. Comprehensive, relevant and timely tourism market demand information allows for good decisions.

It is recommended that the SCTDC develop, implement and manage a market intelligence program to complement market research and data provided by the province. Such a program should include:

- collection of regular visitor statistics from Visitor Information Centres, attractions, events and accommodation operators;
- bi-annual visitor exit survey;
- tourism development effectiveness monitoring for marketing, product development and industry infrastructure development; and
- reporting back to the industry – Industry Market Intelligence Reports.

Collection of Regular Visitor Statistics

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

- create recognized benchmarks;
- provide means to accurately compare performance;
- capture valuable information about which tactics are effective;
- aid in decision-making process when allocating budgets;
- aid in decision making when developing campaigns;
- identify “need areas” for product development, training, and education; and
- provide a platform to articulate tourism’s contribution and economic development agency contribution to tourism stakeholders.¹²

Individual operators in Shelburne County will also benefit from market intelligence to assist in their business planning and longer term strategic planning.

Key characteristics of the program should include:

- collection of the following types of data:
 - number of day visitors and overnight or longer visitors;
 - visitor’s country/province of residence; and
 - for overnight or longer visitors, average length of stay;

¹² Source - Mitchell and Westlake for FedNor, 2008

- data collection templates that are simple and easy to use;
- templates distributed and collected monthly; also during events with reporting immediately thereafter; and
- distribution of templates to accommodation operators on a disk or by email (the incentive for operators to participate will be the consolidated results report that is emailed back to all participants); email reminder to establishments to send info via email (or telephone info) at the end of each month.

Visitor Exit Survey

The purpose of a bi-annual visitor exit survey is to assess visitor satisfaction and activity participation while visiting Shelburne County. This should be a one page (maximum) survey distributed as an on-line follow up with visitors who have provided e-mails and permission to be contacted at various “check points” throughout the County (Visitor Information Centres, attractions, events, accommodation operators, if desired); distribution frequency should be daily as e-mail addresses are received.

Data collected through this type of survey should include:

- visitor demographics -- origin (capture name, address and e-mail), age, party composition;

- visitor satisfaction -- with accommodations, attractions, meals/cuisine, retail, etc.; and
- activity/experience participation -- which attractions, activities/experiences participated in and satisfaction levels;

Measuring Tourism Development Effectiveness

Key sustainable tourism indicators must be developed for Shelburne County in a broad range of categories, including the following:

- marketing:
 - number of visitors -- non-resident and resident; day visits and overnight or longer;
 - visitor expenditures – total/visit and by type of product/service;
 - marketing activities executed and results.
- tourism infrastructure:
 - strengthened/new demand generators;
 - event impact measurement, all events;
 - new tourism experiences offered yearly;
 - Themed routes;
 - number of new tourism businesses established (or ceased business);
 - net job growth;
 - employment in the tourism industry;

- number of training/certification programs participated in; and
- Improved streetscapes;
- traveller services:
 - signage enhancements;
 - map/brochure distribution; and
 - Visitor Information Centre visits;
- partnerships:
 - number of and type of partnerships;
 - number and type of partnership programs implemented; and
 - packages & experiences – number of partnered existing and new packages created.

All promotions should have a tracking number, coupon, call to action (i.e. require an e-mail address) to track the effectiveness of promotion efforts.

Tracking depends on the goal of the piece or activity:

- for internet marketing/website -- able to capture basic information (name, address, e-mail); number of inquiries; Google Analytics (tracks visitors to site, monitors and summarizes user patterns); website statistics (deep web traffic analysis is expensive and NOT necessary as ISPs provide basic tracking software and basic analytics such as number of user sessions,

number of unique users, number of repeat visits, click-throughs to other sites, number of specific web page view counts, number of click-throughs to member/sponsor sites from your site, ads or links, number of coupons redeemed, average length of session, search engine referrals for no extra cost); and

- for print media -- destination awareness, advertising awareness, advertising content, impact of ads on travel intentions; number of brochures requests; number of consumer calls handled; number of coupons redeemed; number of people who registered at DMO website (or VIC) to obtain information.

Industry Market Intelligence Report

This is the consolidation of industry information noted and disseminated to operators monthly. Essentially a newsletter but positioned as a “must read”. All tourism stakeholders in Shelburne County should be on the distribution list.

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

- Shelburne County visitor statistics collected monthly from accommodation and attraction operators in a consolidated format;

- useful provincial data or report summaries with a hypertext link to download the report;
- upcoming events, conferences, shows etc.; and
- new tourism development initiatives in Shelburne County.

3.4.2 Marketing Communications

Enhanced Web Presence

Shelburne County is fortunate to have a number of websites providing information about what to see, what to do, where to go, where to stay and where to eat in Shelburne County. Some are operated by public entities (municipalities), some by non-governmental organizations (Discover Shelburne County Tourism Association) and some by private commercial interests. These many points of contact with potential visitors are beneficial, particularly if the sites are interconnected with hypertext links.

To further enhance Shelburne County's World Wide Web presence, **it is recommended that the SCTDC:**

- work with website owners to ensure at least one, and if possible many of the existing and any new websites are search engine optimized for searches by potential visitors from each of the ideal visitor groups (see Section 3.3.3, above);
- work with website owners to ensure at least one website provide an online searchable

database of all Shelburne County tourism infrastructure – commercial accommodation, attractions, food & beverage, festivals and events, and tourist retail;

- create and maintain a destination blog, modeled after the Bay of Fundy Blog;
- encourage, support and facilitate the posting of photographs and videos of Shelburne County visitor experiences on photo and video sharing websites such as Flickr and YouTube, with hypertext links to related content on Shelburne County websites;
- create and maintain a Facebook fan page for Shelburne County, populated with blog content (see above), links to photos and videos (see above) and postings by past visitors to Shelburne County; and
- work with Shelburne County tourism businesses and operators to ensure that visitors are encouraged to post reviews on TripAdvisor, and that the reviews are linked to Shelburne County websites and the Facebook fan page.

Off-Line Advertisements

Not all potential visitors to Shelburne County will use the internet to search for travel destinations and plan their travel. It is still important that Shelburne County be promoted in “off-line” or traditional advertising media such as newspapers and magazines when

they have the potential to provide access to ideal visitor types, as described above.

To ensure that financial resources allocated to “off-line: advertisements provide maximum impact per dollar spent, it is important that all off-line destination advertising be undertaken in partnership with the Province of Nova Scotia and or Destination South West Nova.

It is recommended that the SCTDC encourage, support and facilitate partnerships among Shelburne County tourism industry stakeholders to strategically promote Shelburne County in selected traditional advertising media.

Doers’ & Dreamers’ Guide

The provincial Doers’ & Dreamers’ Guide is a key marketing communication vehicle for potential visitors planning a trip to Nova Scotia, and for visitors in Nova Scotia planning their itineraries.

It is recommended that the SCTDC work with Discover Shelburne County Tourism Association to ensure that Shelburne County maintains a strong presence in the Doers’ and Dreamers’ Guide.

3.4.3 Sales Promotion

Visitor Information Centres

The four Visitor Information Centres currently operating in Shelburne County are integral and effective components of the County’s sales promotion activities.

It is recommended that the SCTDC encourage and support the continued operation of the existing Visitor Information Centres for as many days as possible between May 1 and October 31 annually, and for at least 8 hours/day – longer on weekends.

Comprehensive Visitor Guide & Map

For the convenience of visitors, and to effectively demonstrate the extensive inventory of accommodation, attractions, food and beverage outlets, festivals and events, and tourist retail shops, **it is recommended that the SCTDC:**

- encourage, support and facilitate the creation of a single, comprehensive Shelburne County visitor guide and a single, comprehensive Shelburne County visitor map;
- encourage, support and facilitate the distribution of the visitor guide and map (above) at all Visitor Information Centres within Shelburne County, as well as at all provincially operated Visitor Information Centres throughout Nova Scotia;
- encourage, support and facilitate the distribution of the visitor guide and map (above) to potential visitors who request them prior to visiting Shelburne County; and
- encourage, support and facilitate the distribution of the visitor guide and map (above) to every household in Shelburne

County to ensure that they are informed hosts for visiting friends and relatives.

Tourism Brochure Distribution

There is a vast array of print brochures produced by Shelburne County tourism organizations and businesses that promote specific activities, attractions, festivals and events, accommodation, food & beverage outlets and tourist retail outlets. These are currently distributed mostly through the four Visitor Information Centres located in Shelburne County.

It is recommended that the SCTDC encourage, support and facilitate the distribution of these brochures to as many business and other locations within Shelburne County, as possible, so that visitors who may not attend one of the Visitor Information Centres are exposed to the brochures and have an opportunity to obtain copies.

Road Sign Program

As most of the travel by visitors within Shelburne County will occur on roads, and touring is one of the recommended ideal visitor types to engage, road signs are a critical component of the “in-County” sales promotion activities.

It is recommended that the SCTDC:

- encourage, support and facilitate the erection of highly visible identifying signs at all Visitor Information Centres, tourism attractions and sites, accommodation, food

& beverage outlets and tourist retail outlets within the County ;

- encourage, support and facilitate the erection of way finding signs for all Visitor Information Centres, tourism attractions and sites, accommodation, food & beverage outlets and tourist retail outlets at key intersections and along main roads within the County;
- encourage, support and facilitate the erection of “welcome” signs for communities within Shelburne County on all roads leading into the communities and along provincial Highway 103; and
- Over time, as new way finding and community welcome signs are erected and older signs are replaced, encourage, support and facilitate the use of a consistent design theme to convey to visitors a sense of connectedness within Shelburne County.

Festival and event schedule

There is a rich variety of festivals and events currently occurring in Shelburne County, all of which attract at least some Shelburne County residents, some of which attract residents from other parts of Nova Scotia for day or weekend visits, and some of which have the potential to attract non-resident visitors for day and overnight or longer visits.

The keys to ensuring that festivals and events with the potential to attract out of County visitors do so successfully are:

- to coordinate the scheduling of festivals and events to minimize conflicts – visitors find it hard to be in two places at once; and
- to broadly communicate the festival and event schedule for the entire County well in advance of when the events occur – ideally, at least 12 months in advance.

It is recommended that the SCTDC work with festival and event organizers, and other tourism industry stakeholders to:

- identify festivals and events with the potential and interest to attract out-of-County visitors (and revisit the list annually);
- develop a festivals and event schedule that minimizes conflicts and maximizes opportunities for other tourism industry players (ie. accommodation, food & beverage, retail) to capitalize on the potential influx of visitors;
- publish – “online” and “offline” -- and maintain a rolling 13 month calendar of festivals and events so that visitors attending a festival or event can be advised of when it will occur in the following year.

3.5 Longer Term Star Attractors

The preceding recommendations in this plan are focused on enhancements to existing visitor experiences, more aggressive marketing activities, and industry organization. These recommendations are intended to generate increased use of existing capacity in

the Shelburne County tourism economy. And there is much room to do this.

When existing capacity is more fully-utilized, continued growth and expansion of the Shelburne County tourism economy will require the introduction of new attractions with strong appeal capable of drawing increased numbers of new visitors. In Nova Scotia, such attractions are called Star Attractors, and Shelburne County has at least two opportunities to develop such attractions.

3.5.1 Shelburne Outdoor Historical Theatre Festival

The Concept

Using Historic Dock Street in the Town of Shelburne as a set for live theatre, much as the movie industry has repeatedly used the area as a set for period movies, the concept is to develop and host an outdoor historical theatre festival.

Visitors would mingle with costumed actors on the streets and in the historic buildings while the actors perform scripted live theatre telling the stories of the early Black and White Loyalist settlers.

A number of scripts would be commissioned from amateur and professional playwrights interested in and knowledgeable about the Loyalist settlement history. Some of the scripts may build on the themes, stories and characters in well-known published works such

as the Book of Negroes and Loyalists and Layabouts, among others.

A combination of professional and seasoned amateur directors, stage managers and actors – including potentially local Re-enactors – would be engaged to develop and deliver the theatrical performances over an initial period of 2-4 weeks in the summer, and eventually expanding to 8 weeks or more.

Parts of Historic Dock Street would be cordoned off at pre-set times, with visitors paying admission to enter these areas and “participate” in the performances.

It is anticipated that as the festival became established, musical performances and live theatre would also be offered at the Osprey Arts Centre during the time of the festival, expanding the choices available to visitors and providing sufficient entertainment to encourage multiple night stays in Shelburne County.

Market Potential

This type of attraction would appeal to two types of visitors: those interested in cultural heritage discovery and those interested in live theatre performances.

As noted in Section 3.3.1 above, the estimated potential of the cultural heritage discovery market in Nova Scotia is more than 800,000 non-resident visitors in 2009 based on the 2004 Visitor Exit Survey results.

The same survey reported that attendance at “live performing theatre presentations”

represented 5% of visits. If participation rates remained unchanged between 2004 and 2009, this would represent approximately 105,000 non-resident visitors in 2009 (5% of 2.1 million non-resident visitors).

The potential of visits by Nova Scotia residents substantially increases the size of both the cultural heritage and live theatre performance markets.

Precedents

Trinity Newfoundland’s Festival in the Bight is an example of successful implementation of this concept, which began in 1993 with the staging of “The New Founde Lande” historical pageant by Rising Tide Theatre, a professional Theatre Company from St. John’s Newfoundland. Since its inception, more than 140,000 visitors have followed two of the primary characters, Matey and Taverner, around the roads of Trinity.

A description of the New Founde Land Trinity Pageant from the Rising Tide website (www.risingtidetheatre.com) provides the best description of the visitor experience: “The anchor event of our festival, the Pageant takes you on a magical journey through the lanes and roads of Trinity. The whole summer company will entertain and enthrall you every step along the way. You will meet an array of colourful characters as our past unfolds in story and song. You will long remember Dustabella Durdle’s first winter here, Peter Easton and his band of pirates, the Minister

consoling his parishioners at St. Paul's church, the raucous mischief of the old traveling court, the heart wrenching stories of hardship and privation, and above all, the strength, courage and humour of our people. And you will surely sing the Ode to Newfoundland as you bid farewell to a great and grand recreation of our cherished past. For 16 years the Trinity Pageant has been hailed by all who see it as a moving and joyous tribute to our beloved New Founde Lande.

Showtime is 2pm outside the Interpretation Centre in Trinity. Please prepare for the possibility of inclement weather, just to be safe bring a sweater and rain gear. As it is an outside walkabout, proper footwear is suggested. and we cannot guarantee that walkers and wheelchairs will always have an unobstructed view. If you have special requirements please contact our Box Office.”

In addition to the Trinity Pageant, there are other established examples of this type of historical theatre including:

- **Louisiana Living History Project** – 2008 was the 12th year for this street theatre complete with “costumed characters from Louisiana history appearing in salon and tableau during the month of December at a variety of locations in New Orleans’ historic French Quarter and on Canal Street,

entertaining and educating visitors and local with tales, songs and dances...”¹³

- **Fredericksburg, Virginia Battlefield Experiences** – “Imagine being able to step into a military camp where you can learn military skills and survival from the actual soldiers. You will experience learning how to shoot black powder by a battle hardened veteran. Listen to and feel what it is like to have survived through one of the most trying times of our nation. We offer driving and/or walking performances on the Fredericksburg, Chancellorsville, Wilderness and Spotsylvania Courthouse Battlefields. Experience the raging conflict through the eyes of a soldier, civilian participant, or both. There are many ways to experience the Fury...the choice is yours.”¹⁴
- **Colonial Williamsburg, Revolutionary City** – “Every day from 3 to 5 p.m., weather permitting, the east end of the Historic Area is transformed into a street theater. Here, the events of the Revolution play out in the stories of everyday life told by the residents of 18th-century Williamsburg. On Tuesdays, Thursdays and Saturdays, “The Collapse of Royal Government,” chronicles the years from 1765 to 1776 during which Great Britain’s King George III and Parliament attempt to tighten controls over their unruly

¹³ <http://anewmuse.com/CHARACTERS>

¹⁴ www.historyexperiences.com/militarycamp

colonies in North America but only succeed in driving them into rebellion. “Citizens at War,” on Wednesdays, Fridays, and Sundays, details the trials and tribulations that Virginians faced from July 1776 to October 1781 as the War for Independence changes their lives and the world they have always known. “Building a Nation” on Mondays explores the lives of residents and prominent visitors to Williamsburg and their contributions to the founding of the new nation.”¹⁵

Next Steps

It is recommended that the SCTDC seek provincial and or federal funding support to undertake a market and financial feasibility study of the Outdoor Historical Theatre Festival concept as a tourism attraction.

3.5.2 Cape Sable Island Environmental Interpretive Centre

The Concept

Building on the strength of the provincially Important Birding Area at The Hawk and Daniel’s Head on Cape Sable Island, combined with the site’s beautiful beach and rich shore and marsh ecosystem, there is an opportunity to establish an environmental

interpretive centre as a compelling visitor attraction.

Such a centre could offer a variety of visitor experiences including, but not necessarily limited to:

- guided and self-guided tours of indoor exhibits and outdoor on-site interpretive trails;
- a staging area and service facility (washrooms, food and beverage service, parking) for birders attracted to the Important Birding Area;
- a staging area for commercially operated boat tours and excursions to off shore islands, lighthouses and shipwreck locations;
- a venue for birding and/or natural environment festivals and events;
- a venue for storm watching;
- seminars and lectures offered by flora and fauna experts;
- half-day, full-day and multi-day programs for visitors interested in learning about the flora and fauna of the site and Cape Sable Island; and
- research support facilities for students, academics and other interested individuals engaged in research on the flora and/or fauna of the site and/or Cape Sable Island.

¹⁵

www.history.org/visit/whatToSeeAndDo/activitiesAndPrograms/RevolutionBegins

The interpretive centre would be staffed and operated by a combination of paid staff and volunteers, charging visitors an admission fee to the facility as well as fees for various services and programs offered.

Initially the centre would be open to the public from May 1 through the end of October, expanding to year round operation (albeit reduced hours from November through April) to accommodate field trip visits by local and regional schools for curriculum-based programs.

Market Potential

This type of attraction would appeal to a wide range of types of visitors, including a number of the ideal visitor types identified for Shelburne County:

- Beach Combers;
- Birders;
- Paddlers;
- Nature Art; and
- Touring.

Combined, these visitor types encompass most if not all of 1.2 million non-resident visitors currently visiting Nova Scotia.

In addition, with the opportunity to vary the programs offered, the Centre would have the potential to attract Nova Scotia residents for multiple return visits.

Precedents

Currently there are a number of interpretive centres in Nova Scotia attracting non-resident and resident visitors, including:

- The Whale Interpretive Centre in Pleasant Bay – <http://novascotiaheritage.ca>
- The Fundy Tidal Interpretive Centre, South Maitland – www.southmaitlandns.com
- Bras d'Or Lakes & Watershed Interpretive Centre – www.brasdor-conservation.com/interpretive
- Whycocomagh Eco-Centre, Whycocomagh -- www.whycocomaghecocentre.com

Next Steps

It is recommended that the SCTDC seek provincial and or federal funding support to undertake a market and financial feasibility study of the Cape Sable Island Environmental Interpretive Centre concept as a tourism attraction.

3.6 Shelburne County Development Committee (SCTDC)

Many solid tourism destination development plans that are endorsed and supported by tourism industry stakeholders flounder for lack of leadership, responsibility and resources to support implementation. Shelburne County has already taken the crucial first step with the

establishment of the Shelburne County Tourism Development Committee (SCTDC).

SCTDC was formed in September 2009 with a mandate to undertake the development of the Shelburne County Tourism Development Plan, and to provide direction and supervision for the newly established Development Coordinator. SCTDC comprises 12 members as follows:

- 1 elected municipal government official from each of the five supporting municipal units (5 members);
- 1 representative from a tourism organization or business located within each of the five municipal unit boundaries (5 members); and
- 2 representatives from Discover Shelburne County Tourism Association (2 members).

The five municipal units comprising Shelburne County joined forces to provide a 5-year commitment of funding for SCTDC and the Development Coordinator position.

This Tourism Destination Development Plan will provide direction for the actions of the SCTDC and the Coordinator over the next approximately 4-5 years. If the plan is to be successfully implemented, **it is recommended** that the five municipal units comprising Shelburne County provide sufficient financial resources to enable the SCTDC and Coordinator to undertake the tasks and activities outlined in this plan.

It is estimated that a minimum of \$10,000 annually is required to fund the meeting and administrative functions of the SCTDC, and an additional minimum of \$50,000 annually is required to fund the day to day activities of the Development Coordinator assuming that in-kind contributions for office space, equipment and support are provided.

From time to time additional funds will be required to support the implementation of specific plan initiatives and activities, as described above. These funds are likely to be provided from a combination of municipal contributions, provincial and/or federal program contributions, and tourism industry stakeholder contributions.

It is also recommended that the SCTDC prepare an annual report for presentation to each of the five municipal units that describes:

- the status of Tourism Destination Development Plan implementation over the preceding year;
- the economic benefits of tourism in Shelburne County over the preceding year; and
- tourism development and marketing initiatives to be undertaken during the following year, including a request for project funding as required to support the initiatives.

Sustainable tourism destination development in Shelburne County beyond the life of this

plan will require that the five municipal units continue to cooperate and combine resources to develop and market Shelburne County. **It is recommended** that the Tourism Destination Development Plan be updated before the expiry of the current 5-year commitment, and that the update recommendations be used as a guide to determine the scope and scale of the next agreement between the five municipal units.

3.7 Discover Shelburne County Tourism Association

Discover Shelburne County Tourism Association is a membership-based association of tourism businesses operating in Shelburne County. It provides opportunities for its members to promote their facilities, services and experiences through traditional media and the Discover Shelburne County website (which is currently being redesigned).

It is recommended that through membership in the SCTDC, and support of the recommendations in this development plan, the Association continue to represent the interests of Shelburne County tourism businesses with respect to destination development and marketing in addition to its other tourism development and marketing activities.

Appendix A: Shelburne County Tourism Industry Inventory

Accommodation Inventory		
Property Name	Type	Community
Stage Coach Inn	Bed & Breakfast	Barrington
Mama's by the Sea B & B	Bed & Breakfast	Clark's Harbour
Seventeen South Bed & Breakfast	Bed & Breakfast	Lockeport
Island Breeze Inn	Bed & Breakfast	North East Point
Shand's Look-off Bed & Breakfast	Bed & Breakfast	Shag Harbour
Millstones Bed & Breakfast	Bed & Breakfast	Shelburne
Water Street Lighthouse Bed & Breakfast	Bed & Breakfast	Shelburne
Horizon Chalets and Motel	Hotel / Motel	Barrington Passage
Cape Cod Colony Motel	Hotel / Motel	Shelburne
MacKenzie's Motel & Cottages	Hotel / Motel	Shelburne
Wildwood Motel	Hotel / Motel	Shelburne
Sea Song Inn	Inn	Sandy Point
Cooper's Inn	Inn	Shelburne
Loyalist Inn	Inn	Shelburne
Slateville Cottage	Cottage	Barrington
Bay Bluff Cottage	Cottage	Blanche
A Bird's I View	Cottage	Cape Sable Island
Boulder Cove Cottages	Cottage	Churchover
Clyde River Cottages & Campground	Cottage	Clyde River
Sable River View Cottages	Cottage	East Sable
Shipwright's Cottage	Cottage	Gunning Cove
Whispering Waves Cottages	Cottage	Ingomar
Collins Cottage	Cottage	Jordan Bay
Splash Rock Cottage	Cottage	Lockeport
Ocean Mist Cottages	Cottage	Lockeport
Seaside Cottages at Ginger Hill	Cottage	Lockeport
Seeblick Cottage	Cottage	Lockeport
Sanderling Beach House	Cottage	Louis Head
A Blue House	Cottage	Louis Head
Roseway River Cottages Ltd.	Cottage	Lower Ohio
Lockeport Cottages & Campground	Cottage	Lydgate
Morning Mist Sanctuary & Spa	Cottage	Middle Ohio
Cape Sable Cottages	Cottage	Newellton
Collupy Guest House	Cottage	Pleasant Point

Accommodation Inventory		
Property Name	Type	Community
Bramble Lane Cottage by the Sea	Cottage	Port L'Hebert
Meadow Pines Cottage	Cottage	Sable River
Swim Guest House	Cottage	Sable River
Rockland Cottage	Cottage	Sable River
Jordan Bay Luxury Cottages	Cottage	Sandy Point
Ocean's Tranquility Guest House	Cottage	Sandy Point
Above Studio 14	Cottage	Shelburne
Barrack's Cove Kitchenettes	Cottage	Shelburne
Bishop's Bailiwick Guest House	Cottage	Shelburne
Captain McLean's Carriage House	Cottage	Shelburne
Shelburne Harbourside Cottages	Cottage	Shelburne
Pool Side Cottage Retreat	Cottage	Upper Clyde
Moony Resort	Cottage	Upper Ohio
Talking Rock Ocean Cottage	Cottage	Villagedale
Castaway Ocean Lodge	Cottage	West Green Harbour
Clyde Farm Campground	Campground	Clyde River
Clyde River Cottages & Campground	Campground	Clyde River
Louis Head Beach Campground	Campground	Louis Head
Lockeport Cottages & Campground	Campground	Lydgate
The Islands Provincial Park	Campground	Shelburne

Attraction Inventory	
Attraction Name	Location
Beach	
The Hawk Beach	Cape Sable Island
Black Point Beach	Rockland
Colonel Locke's Beach	Lockeport
Crescent Beach	Lockeport
Crow Neck Island Beach	West Baccaro
Ingomar Beach	Ingomar
Johnson's Pond Beach	East Sable River
Little Harbour Beach	Little Harobour
Louis Head Beach	Louis Head
North East Point Beach	Cape Sable Island
Roseway/Round Bay Beach	Roseway
Sandy Point Light Beach	Sandy Point
South Side Beach	Cape Sable Island
Stoney Island Beach	Cape Sable Island
Welkum Park	Welshtown
Bicycling	
Harbourside Cottages	Shelburne
Town of Shelburne Bicycle Routes	Shelburne
Billiards	
Passage Pub	Barrington Passage
Birding	
MacLeod Bird Tour	Shelburne
The Hawk & Daniels Head	Cape Sable Island
Blanche Bird watching site	Blanche
Crow Neck Beach and Baccaro Lighthouse	Baccaro
Lockeport & West Head Briding Trail	Lockeport
Matthew's Lake & Hemeon Head Biriding Area	Arnold
Locke's Island Birding & Hiking Tours	Lockeport
Bowling	
Island Lanes	Clark's Harbour
Parrot's Pin Bowling	Lockeport
Shelburne Men's Bowling League	Shelburne
Shelburne Youth Bowling Assoc	Shelburne
Swansburg's Lanes	Shelburne

Attraction Inventory	
Attraction Name	Location
Canoe/Kayak	
Sea Dog	Shelburne
Maritime Canoe Outfitters Ltd.	Shelburne
Portage Canoeworks	Clyde River
Kayak Launching Locations	Shelburne County
Sandy Lane Vacations Kayak Rentals	Shelburne
Diving	
Wayne's Scuba Services	Lockeport
Equestrian	
Char-Lee Horse Stables	Thomasville
Harbour Edge Equestrian Facility Incorporated	North East Harbour

Attraction Inventory	
Attraction Name	Location
Festival/Event	
Barrington & Area Chamber of Commerce Christmas Parade	Barrington
Barrington Exhibition	Barrington
Barrington River Canoe Rally	Barrington
Christmas by the Sea	Lockeport
Christmas Carol Concert @ Old Meeting House	Barrington
Clyde River Canoe Rally	Clyde River
ERMES Craft Market	Shag Harbour
Harmony Basaar Festival of Women & Song	Lockeport
Harvest Festival -- Island Provincial Park	Shelburne
Island Days Festival	Clark's Harbour
Lighting of the Lens @ Seal Island Lighthouse Museum	Barrington
Lockeport Canada Day	Lockeport
Lockeport Sea Derby	Lockeport
Loyalist 5-mile Road Race	Shelburne
N.S. Marathon	Barrington
Pumpkin Festival	Shelburne
Pumpkin Pie Festival	Clark's Harbour
Roseway River Canoe Rally	Shelburne
Sable River Farmers' Market	Sable River
Shag Harbour UFO Incident Society Festival & Symposium	Shag Harbour
Shelburne Chamber of Commerce Christmas Parade	Shelburne
Shelburne County Lobster Festival	Shelburne
Shelburne County Exhibition	Shelburne
Shelburne Farmer's Market	Shelburne
Shelburne Fireman's Bazaar & 4x4 Rally	Shelburne
Shelburne Founders' Days	Shelburne
Shelburne Writer's Festival	Shelburne
Stoney Island Pow Wow	Stoney Island Beach
Town of Clark's Harbour Canada Day	Clark's Harbour
Turning on the Lights	Barrington
Whirligig and Weathervane Festival	Shelburne waterfront
Winterfest	Lockeport
Woods Harbour Days	Woods Harbour

Attraction Inventory	
Attraction Name	Location
Fitness Centre	
Causeway Fitness	Barrington Passage
Flex Appeal	Barrington Passage
You and You Fitness	Barrington Passage
Fit Folk	Shelburne
Fishing	
Roseway River Trout Farm	Upper Ohio
Golf	
Aqua Drive	Lake George
River Hills Golf & Country Club	Clyde River
Historic Site	
Historic Dock Street	Shelburne
Fort St. Louis	Port Latour
Sikh Landing Site	Charlesville
The Locke Family Streetscape	Lockeport
The Stone Lion	Clark's Harbour
Libraries	
Western Counties Regional Library - Barrington Passage	Barrington Passage
Western Counties Regional Library - Clark's Harbour	Clark's Harbour
Western Counties Regional Library - Lockeport, Lillian	Lockeport
Western Counties Regional Library - Shelburne, McKay	Shelburne
Lighthouse	
Baccaro Point	near Port Latour
Bon Portage	south tip of Outer Island
Cape Negro Island	Blanche
Cape Roseway	McNutt's Island at entrance to Shelburne
Cape Sable	Cape Sable Island
Carters Light	Lockeport
Charlesville Lighthouse	near Upper Woods Harbour
Gull Rock	Lockeport
Sandy Point	Sandy Point
Seal Island	near Clark's Harbour
Stoddard Island	Shag Harbour
The Salvages	near Port Latour
West Head	
Woods Harbour	small island near Woods Harbour

Attraction Inventory	
Attraction Name	Location
Marina/Yacht Club	
Shelburne Harbour Yacht Club	Shelburne
Cotter's Wharf	Lockeport
Movie Theatre	
Capitol Theatre	Shelburne
Museums/Heritage Centres	
Archelaus Smith Historical Society	Centreville
Barrington Woolen Mill	Barrington
Black Loyalist Heritage Society	Birchtown
Cape Sable Historical Society	Barrington
Chapel Hill Historical Society & Museum	Shag Harbour
Crescent Beach Centre	Lockeport
Little School Museum	Lockeport
Muir-Cox Shipbuilding Interpretive Centre	Shelburne
Old Meeting House Museum	Barrington
Ross-Thomson House	Shelburne
Samuel Wood Historical Society & Museum	Woods Harbour
Seal Island Light Museum	Barrington
Shelburne County Archives & Genealogical Society	Shelburne
Shelburne County Museum	Shelburne
Dory Shop Museum	Shelburne
Western Counties Military Museum	Barrington
Shag Harbour UFO Interpretive Centre/Museum	Shag Harbour
Ragged Island Historical Society	Lockeport
R&D Nickerson	Barrington Passage
Seaside Heritage Centre	Clark's Harbour
Performing Arts	
Osprey Arts Centre	Shelburne

Attraction Inventory	
Attraction Name	Location
Provincial Parks	
The Islands Provincial Park	Shelburne
Sable River Provincial Park	Sable River
Sand Hills Beach Provincial Park	Vilagedale
Recreation Facilities	
Roger Grovestine Recreation Complex	Shelburne
Town of Clark's Harbour Recreation	Clark's Harbour
Town of Lockeport Recreation	Lockeport
Shelburne Curling Club	Shelburne
Sherose Island Recreation Centre	Barrington Passage
Shelburne County Arena	Shelburne
Historical Re-enactors	
Shelburne Longboat Society	Shelburne
Shelburne Re-enactors	Shelburne
Sightseeing	
Shelburne Harbour Boat Tours	Shelburne
Lockeport Loop	Lockeport & Shelburne County
Coastal Excursions Day Tours	Pubnico
Trails	
Barrington Bay Trail	Barrington Passage
Black Loyalist Heritage Trail	Birchtown
Tom Tigney & Foot Bridge Walking Trails	Sable River
Lockeport Walking Trail	Lockeport
Jordan River Walking Trail	Jordan River
Port L'Hebert Pocket Wilderness	Port L'Hebert
Roseway River Trail	Shelburne
Woods Harbour Trail	Woods Harbour
Nature Trail	Barrington Arena
Rail Line Trail Town of Shelburne	Shelburne
Scenic Walking Tour of Lockeport	Lockeport
Woodland Multi-use Trail Association	Shelburne County

Business Name	Retail Inventory Type	Community
Adroit Color Artisan	Art Galleries	Shelburne
Galleria Donati	Art Galleries	Sandy Point
Driftwood Studio & Gallery	Artisan's Co-Ops / Studios	Barrington Passage
Osprey Arts Centre	Artisan's Co-Ops / Studios	Shelburne
Seagrass & Stitches	Artisan's Co-Ops / Studios	Lockeport
Tilly's Head Studio	Artisan's Co-Ops / Studios	Port L'Hebert
Bev Nickerson	Artisan's Co-Ops / Studios	Jordan Branch Road
The Whirligig	Books & Collectibles	Shelburne
Portage Canoeworks	Canoes	Clyde River
Shelburne Barrel	Cooperage	Shelburne
Clyde River Convenience	Crafts/Hobby	Clyde River
Fundy Finds Beach Glass	Crafts/Hobby	Shelburne
Lighthouse Cottage Woolens	Crafts/Hobby	Clark's Harbour
LinArt Designs	Crafts/Hobby	Shelburne
LJ cards & More	Crafts/Hobby	Newellton
Spencer's Garden Centre	Crafts/Hobby	Shelburne
Frank Stewart	Antiques & Collectibles	Jordan Falls
Stitches and Stuff	Crafts/Hobby	Churchover
Ruth Rocks Folk Art	Crafts/Hobby	Barrington
Charlotte Lane Café & Crafts	Gift / Specialty Shops	Shelburne
Sweet T's	Gift / Specialty Shops	Shelburne
The Rose Bouquet Flowers & Gifts	Gift / Specialty Shops	Shelburne
Tottie's Crafts	Gift / Specialty Shops	Shelburne
Three Pines Leather	Leather Crafts	Sable River
Tuter Tiles	Pottery	Little Harbour
April Smith Photography	Original Art	Port LaTour
Barry Crowel	Original Art	Gunning Cove
Ernest Dexter	Original Art	Shelburne
Belinda Bell	Stained Glass	Shelburne
Clifford Coffin	Woodworking	Sandy Point

Food & Beverage Inventory		
Business Name	Type	Community
Organic Garden Café	Cafés	Barrington Passage
The Beandock	Cafés	Shelburne
Lothar's Café	Culinary experience	Shelburne
Chef's Table	Culinary experience	Sable River
Charlotte Lane Café & Crafts	Culinary experience	Shelburne
Dan's Ice Cream Shop	Ice-Cream	Barrington Passage
District 34 Lounge	Lounges	Barrington Passage
Sea Dog Saloon	Pubs / Taverns / Lounges	Shelburne
JB's Restaurant	Restaurants	Barrington Passage
Ocean Treasures	Restaurants	Barrington Passage
Parrot's Pin Cafe	Restaurants	Lockeport
Pizza Delight	Restaurants	Barrington Passage
Thomson's Drive-in Restaurant Ltd.	Restaurants	Clyde River
Town & Country	Restaurants	Lockeport
White Gull Restaurant/Marina	Restaurants	Lockeport
Mr. Fish	Restaurants	Shelburne
Sandy Point Lighthouse Centre	Restaurants	Sandy Point
Scotia Lunch	Restaurants	Shelburne
Sophia's Café	Restaurants	Shelburne
Loyalist Inn	Restaurants	Shelburne
Luong's Family Restaurant	Restaurants	Shelburne
Shelburne Yacht Club	Restaurants	Shelburne
Captain Wayne's Café	Restaurants	Woods Harbour
3 D's	Restaurants / Fast Food	Barrington Passage
McDonalds Restaurant	Restaurants / Fast Food	Barrington Passage
Papa's Pasta & Steak House	Restaurants / Fast Food	Barrington Passage
Papparoni Pizza & Donair	Restaurants / Fast Food	Barrington Passage
Subway	Restaurants / Fast Food	Barrington Passage
Tim Hortons	Restaurants / Fast Food	Barrington Passage
West Head Take Out	Restaurants / Fast Food	Cape Sable Island
Woods Harbour Pizza	Restaurants / Fast Food	Woods Harbour
The Bayman	Restaurants / Fast Food	East Green Harbour
A1 Piero's Pizza	Restaurants / Fast Food	Shelburne
Little Italy Pizzeria	Restaurants / Fast Food	Shelburne
Red & White Pizza	Restaurants / Fast Food	Clark's Harbour
Subway	Restaurants / Fast Food	Shelburne
Tim Hortons	Restaurants / Fast Food	Shelburne

Transportation Inventory		
Business Name	Type	Community
A-1 Taxi	Taxi Service	Shelburne
Cape Island Taxi	Taxi Service	Stoney Island
Ray's Taxi	Taxi Service	Shelburne
Cloud Nine	Shuttle Service	Yarmouth (serving Shelburne County
Campbell's Shuttle	Shuttle Service	Yarmouth (serving Shelburne County
Trius	Bus Service	Yarmouth (serving Shelburne County



Appendix B: Industry Stakeholders' Workshop Report

Workshop Attendees

A total of 36 stakeholders attended the workshop held at the Sandy Point Community Centre on January 14, 2010. The list of attendees includes:

Allan Nelson
Bernice Goodick
Beverly Cox
Samantha Brannen
Brenda Maxwell
Brian Holland
Calvin Butler
Cathy Stoddart
Dixie Redmond
Doris Townsend
Elizabeth Rhuland
Gloria Buree
Hazel Keddy
Heather Yule
Helen Potgieter
Howard Roszel
Irene Baker
Suzy Atwood
Jim Spencer
Jerry Locke
Joan Bower
Larry Peach
Lee Keating
Lynne Perry
Lonnie Townsend
Marilyn Johnston

Pat Hudson
Penny Smith
Sandra Downey
Jim Goodick
Shannon Crowell
Sherm Embree
Shawna Symonds
Sharon Johnson
Dale Nickerson
Charlene Harris

Workshop Agenda

9:30	Introductions, Purpose, Agenda
10:00	Destination Development Objectives
10:30	Break
10:45	Supply, Marketing, Demand –
Noon	Lunch
1:00	Opportunities & Issues
2:00	Break
2:15	Strategic Directions
3:45	Next Steps

Workshop Purpose

D'Arcy identified the workshop purpose as twofold:

- to review and validate the Situation Assessment (document circulated to workshop attendees in advance of the workshop)
- to consider and comment on emerging strategic directions

Destination Development Objectives

The Situation Assessment identified the proposed destination development goal & objectives as:

- The goal is to create a long-term destination development plan for boosting tourism in Shelburne County.
- Success of the destination development plan and its implementation will be measured by achieving five objectives or outcomes:
 - To enhance the quality of visitor experience provided in Shelburne County
 - To extend the length of stays by visitors to Shelburne County
 - To increase tourism generated revenues in the Shelburne County regional economy
 - To raise awareness of Shelburne County as a destination
 - To continually monitor and assess the health of the County's tourism economy

Workshop participants were asked to consider the question: "Are they appropriate?" Responses included the following:

- In Bangor no empty rooms; there b/c of world baseball tourney – is there opportunity to build - theme for long time has been Shelburne as destination; can we attract people b/c of specific events/concerts; etc.; better to attract 'for event' people; can we develop a tourney; etc; does develop as destination infer excludes some markets;
- How long is a 'destination'?
- Like five goals with action verbs; like word visitor as it captures lots of types; like idea to adapt discussion around destination
- 92,000 to VIC research with drop ins on their way somewhere else; use Visitor Information Centres (VICs) for washrooms; how long will you stay in Shelburne – Historic District sells;
- Resources from Nova Scotia Department of Tourism, Culture & Heritage – new group formed called Festivals and Events NS to attract festivals and events to rural NS; workshop this year
- Have weekly bookings during summer -- guests come for beaches, peace and quiet and quality time with their family
- Real estate visitors – sometimes Real Estate agents are the ones who sell the area; tourism is broad based.

- once pass through market sees harbour etc. plan on coming back the next year
- Need broad definitions for visitor and tourism; interest is enhancing the experience goal; people will travel to Charlotte Lane for dinner because of the high quality and hospitality offered; tourism here has relied too much on the easy US market and we need to get beyond that
- Want to encourage more representation from tour operators – more should be at this meeting; need to explain how and why they will benefit from providing information etc.; retail is a hard sector to engage and yet they have the opportunity to influence visitors; retailers need to know their areas – this plan needs to have training for all front-line people who interact with visitors
- With familiarization (FAM) tour last year hard to get gas station folks involved etc. so need to find means to engage these sectors.
- Fixed roof accommodators did not feel they needed support to help fill rooms
- If did not drive on dirt roads, you missed a lot! (in response to D’Arcy’s comment that consultants drove all of the paved roads, and some of the dirt roads, of Shelburne County in search of inventory items)
- How effective is the Doers and Dreamers Guide as advertising? Need to be in places for all generations.
- Community submits to Nova Scotia Department of Tourism, Culture and Heritage and so Shelburne needs to get on – www.novascotia.com offers lots of free things that Shelburne needs to take advantage of on a regular and on-going basis.
- Need to be ‘visible’ at all times; i.e. taking canoes o/s when weather good
- What is definition of being market ready? Do we need to define differently going forward?
- Work towards limitations of capacity – has negative connotations;
- Road side pull-offs and boat launches at municipal docks – not quite ready
- Should an observation/conclusion be ‘retain’ businesses/inventory; once you lose them it is very hard to get them back.
- Transportation by personal sea vessel/boat
- Demand only captures licensed accommodation; can we get more detail/breakout on campgrounds?; Any

Supply, Marketing and Demand Inventory

D’Arcy provided an overview of the Supply and Marketing Activities inventories, as well as analysis of current visitor demand in Shelburne County as contained in the Situation Assessment Report. Comments raised during the overview included:

other data on changes in monthly stays for the County?; how are non-resident property owners reflected in numbers and what is impact? What parts of tourism are reflected in economic impact spend? If a cottager spends \$10k into their cottage to attract visitors is that counted? Dip in occupancy also reflects change in US to Canadian \$\$

- Add lakes/rivers onto itinerary

After the presentation of the overview, attendees were divided into groups of 4-5 persons and asked to review the tourism supply and marketing activities inventory that had been compiled, and to identify:

- errors – name, location, etc.
- missing information

Each group was asked to record their “edits” on the inventory sheets and accompanying worksheets. These were collected and are being used by the consultants to revise the inventory.

Opportunities & Issues

D’Arcy provided an overview of the opportunities and issues identified by the consulting team (and reported in the Situation Assessment Report). Comments received during the overview included the following:

- Shelburne has highest concentration of bedrooms – does that mean that all activities/efforts are centred on Shelburne? Need to reflect other opportunities that are

outside the official boundaries; opportunity to do packaging with operators outside Shelburne boundaries;

- Like early stage development phrase – also an opportunity. Big attraction, by being in early stage development, can learn from best practices and others experiences; so don’t want to lose the resources; need to develop in appropriate ways;
- Cultural heritage resources – more can be added here; Acadian history – Charles de Boise (?); no in depth recounting of New England Planters; Aboriginal history and presence – Mic Mac- there but overlooked; Cape Sable island are embracing canoes, Pow Wows, rich lumber industry in southwest Nova Scotia that could be interpreted/stories
- Six core experiences as part of Nova Scotia – what are they? Shelburne needs to come up with iconic image to include in images thought about
- Liability – apathy among residents about change, growth, looking beyond lobster as it has changed; need to engage people more; residents not interested in cultural and heritage activities
- From away – what is the opportunity? How do we harness the newcomers and use as asset.
- Larry Peach (Tourism Development Officer from Yarmouth & Acadian Shores) has

brochure that lists Acadian sites and perhaps can expand to include Shelburne in next year's.

- Shelburne has lots of exposure from film industry and there may be more opportunities.
- Cruise industry as well. Both this and movie have infrastructure in place.
- Cape Sable Island – rocks stuck in ocean? Is there an opportunity to develop diving site; database/inventory of shipwrecks; was a plan developed - but there may be an issue with roughness of sea, turbulence and tides make it difficult to do; collect bottles after big storms? Salvage/use under water/remote cameras? Look for database and see if/what opportunity is.
- Surfing/windsurfing is an opportunity
- Storm watching a la Tofino, is an opportunity
- Guiding – fishing/hunting/bear/coyote/photography/ka yaking – all to support
- In-land sea kayaking and canoeing
- Located in UNESCO Biosphere – need to build on this/leverage it
- Get requests for wedding destination – really pretty church; etc. could we combine all of the wedding related services on website?

- Is there an opportunity for migration of Monarch Butterflies?
- Watchful wildlife—seminar coming up
- Upper Clyde area—land has been bought by ?? Coast Guard initiative – get more info

Strategic Directions

D'Arcy provided an overview of the emerging “strategic directions” (or preliminary recommendations) as developed by the consulting team. During the overview presentations, a number of comments/questions were offered by attendees, including:

- Recreational and event tourism – i.e. curling etc. – can attract smaller sporting events – localized demand; network building on event coordinator side; hosting team sports but hard to find places for people to stay; can create any event you want but make sure they are from far enough away to stay overnight; sailing and boat tours – sailing school from Shelburne yacht club; best harbour; had east Albacore races for first time last year –can it be built? Dory racing – could grow; o/s Lunenburg came to Shelburne to pick up their boats;
- Trails? Have huge inventory of trails not in inventory – shared uses; like Appalachian Trail
- Planters heritage?

- Lifestyle retreat – combining a number of things together
 - Feb 2011 – Canada Winter Games to Halifax – can we use it to invite back for another visit?
 - Living History – re-enactment
 - Marketing Intelligence – lots of info around County, but need to pull it together
 - Web presence – need to actively link with each other; did holiday e-newsletter recently – was successful – South shore Cafe
 - Need to include knowledgeable staff as part of market ready experiences – be ready for festivals and events, etc. need to understand the expectations of those ‘from away’
 - Should partnering be identified as specific initiative?
 - Festivals and events happening now need continuing support or more than they are getting now; Harmony Bazaar for example; don’t always focus on creating new; five day event with Cole Harbour group last year as example
 - The Dancing Beggars; some folks still around to kick start; other examples
 - Opportunity to build on interest in reality TV and interest in other people’s lives; re-enactment group has application in for more \$\$ for costumes etc and talking to museums as backdrop and what people to profile/highlight
 - Shelburne, compared to Williamsburg, Virginia, has more heritage already in place and that are original
 - Partner for Interpretive Centre could be Biosphere Reserve group – NCC Lawrencetown; Mersey Tobiotic Research Institute
 - Ross Farm as example of what to do in area
 - As two “star” attractors are developed keep in mind what age demographics you are targeting in order to build interest and demand from younger crowd
 - ship building history as another story/third largest natural harbour in the world
 - There is map of canoe routes that shows every map, rock etc. from NS Natural Resources
 - Can Shelburne own the Biosphere?? meeting end of March by invitation only at White Point; need to be there with strong presence
- Attendees again divided into work groups to discuss the strategic directions and attempt to reach consensus on their relative priorities. Worksheets were collected from each group for use by the consultants in prioritizing the recommendations. Items noted when groups reported back included the following.

- Five #1s; marketing intelligence – working with local population; heritage fair with local schools; hospitality training; focus on the land – Newfoundland example to retain and get excited about; to develop appreciation for the area and when work in the business are informed
- Additions to list – enhanced support for existing festivals and events; cycling – network of linked; Five #1s too; Experiences for visitors; tie to Biosphere, coastal etc; tied closely
- Three firsts and two seconds – high potential experience markets – need to sell our own experiences – no one can do it better; which leads to marketing intelligence and marketing well; emphasize local product; see few NS produced wines, spirits; ales; -- these need to be sold locally; industry coordination; extend into fall shoulder season
- Looked at easiest to do; Star Attractions – unique in area, easy to do; little investment for greater return; pet peeves – road signs give image of area – repair or take down; lots of web presence but need to coordinate and easy investment
- Three #1s – Marketing Intelligence; Star Attraction – Theatre; in-market tools; Nova Scotia Community College Shelburne campus has course that focuses on three products each year; also run Service Excellence; Super Host Atlantic
- Three #1s – Staff Resources to provide foundation; Marketing intelligences as another foundation; Web presence – cost effective way to get to # of people
- Nine #1s – all are important! Dedicated staff person and funding and support to make sure momentum is there; Training of staff; Marketing intelligence – annual property stats; Web Presence – Google map to increase presence of Shelburne County and testimonials; any discussion on where funding coming from for this? Idea – Star Attraction – where do names come from and why? Gather data and use
- Hi potential experience markets – hands on experiences; market ready experiences – get doors opened; packaging in place etc. inform VIC staff; Web presence – if they know what we have they will come; staff survey/resources – how are we doing? marketing intelligence – have stats; know how to improve;

Next Steps

D'Arcy advised that the next steps following the completion of the workshop included the following:

- Preparation and distribution of Workshop Report
- Preparation and delivery of Draft Final Report to the Shelburne County Tourism Development Committee (before the end of February).

