

Strategic Tourism Expansion Program

Sustainable Tourism Plan: Parrsboro Shore

FINAL REPORT

November 2016



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“A rising tide lifts all boats”.
The tide doesn’t get any higher than here!

Introduction

The Strategic Tourism Expansion Program (STEP) along the Parrsboro Shore was triggered in early summer 2015 by a community committed to working for tourism growth. A mature tourism area with the experience, motivation and momentum to benefit from strategic action, STEP Parrsboro Shore kicked off the project with clear understanding of the fundamental pillars for success in tourism:

- 1. Visitors today seek “sight doing” and not “sight seeing”; they find enjoyment in destinations offering unique and enticing experiences that encourage participation and learning in well-serviced and welcoming environments. Customer focus is critical to success.**
- 2. Visitors view destinations as “areas of interest” not geographically or politically. With this in mind, early into the process, the area of scope for STEP was expanded (loosely) to the Parrsboro Shore, from Economy to Advocate.**
- 3. Local communities and residents make essential contributions to successful tourism and community members need to be engaged.**

Proponent for the Parrsboro Shore STEP project was the Town of Parrsboro (now amalgamated with the Municipality of Cumberland) which committed critical and valuable staff resources to the project. In partnership with ACOA-Tourism Atlantic and Tourism Nova Scotia, both of whom were engaged with active representation and support throughout, all three governments invested dollars in the STEP project to develop a Sustainable Tourism Plan AND to deliver workshops specifically designed to meet the needs of the area. Broad Reach Strategies Ltd (Marsha Pond) from Halifax was contracted as project Consultant to provide professional guidance and mentorship.

A strategically-selected and industry-led Working Committee (identified in Appendix 1) chaired by David Beattie, Gillespie House Inn led the initiative and continues to manage project execution. The committee was offered invaluable, hand-on support from Town staffer Taylor Redmond; the group remains committed to the process and is populated by individuals with significant personal and community investment in the area and who appreciate that partnership at many levels is critical for success. This collaboration of public and private sector time, energy and money was important to the successes achieved by the volunteer Working Committee throughout the project.

Comment [David Bea1]: Perhaps all members should be named in the same place as it truly was a collaborative effort.

All STEP participants brought to the table a positive attitude to growing tourism; rich understanding of the Shore; deep appreciation of its history and culture and determination to succeed. Parrsboro Shore’s enthusiasm to participate in STEP was clearly aligned with the Nova Scotia tourism goal, outlined in the Ivany Report, to double tourism revenues by 2020. Parrsboro Shore was ready and needed dedicated resources and fresh focus to jumpstart incremental tourism initiatives. Enter STEP!

Outlined in this document are the context for this Plan, its goal and objectives key development benchmarks, culminating with a detailed go-forward Sustainable Tourism Plan for Parrsboro Shore.

Purpose of STEP

The Strategic Tourism Expansion Program (STEP) is designed to increase the quality and calibre of visitor experiences offered by operators and communities in Atlantic Canada, in order to help communities, realize greater benefits from tourism in economic, social and cultural ways. It is a pan-Atlantic program designed and administered by ACOA-Tourism Atlantic collaboratively with provincial and local partners. Parrsboro Shore qualified as a STEP “candidate community” because of its unique and enticing tourism offerings, the commitment of its industry to work for growth and recognition of the Parrsboro Shore potential to develop as a destination.

Basically, STEP emphasizes industry leadership and community collaboration to build visitor experience programs and services, and to enhance an area’s capacity to attract customers and satisfy their needs in measurable ways. The overall goal of this STEP assignment was to arm the Parrsboro Shore with ammunition to become a sustainable tourism destination.

Comment [David Bea2]: Suggest deleting “Basically” and also the 2nd sentence. Also how about saying visitors instead of customers?

STEP is designed as a six-stage process (see Table 1 below) carried out over a 12-month period. Parrsboro was granted an extension on the plan deadline in order to include additional capacity building sessions, which are **all detailed on page xxx.**

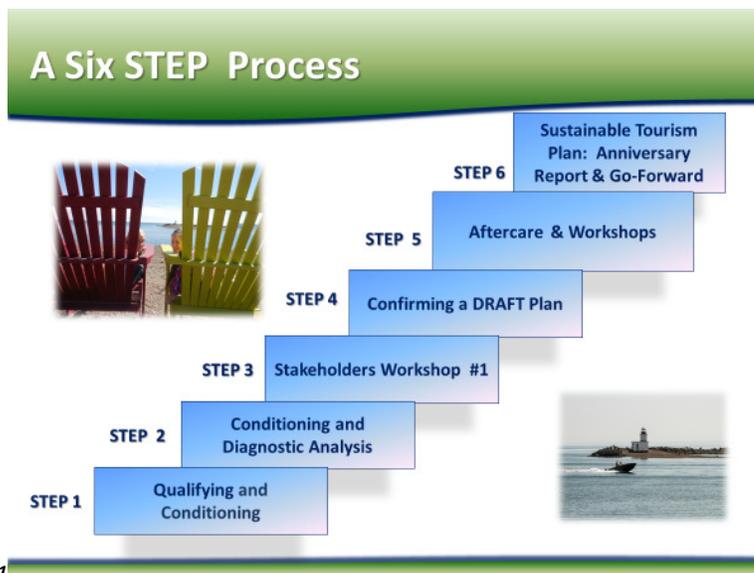


Table 1

The STEP process in Parrsboro and area focused on:

- Strategic planning
- Building tourism capacity
- Experiential product development, and
- Achievable implementation and measurement.

The intended STEP outcomes for Parrisboro Shore were identified from the outset and included a strong understanding of:

1. The STEP requirements in achieving sustainable tourism development at the destination level
2. How changing tourism trends from the global to the regional level, affect the tourism industry along Parrisboro Shore
3. The skills and expertise required to identify, enable and facilitate the development of outstanding and enticing experiential tourism
4. The processes and abilities required to develop and implement an integrated and actionable STEP Forward Sustainable Tourism Plan
5. The importance of developing and establishing a community stakeholder network, active and engaged in the development and execution of the STEP plan
6. A STEP Sustainable Tourism Plan which is tailored for the region and therefore achievable and affordable.

The Parrisboro Shore STEP project was timely. The program's emphasis on mentoring for community leadership and capacity building became increasingly important as, during the course of STEP, the role and funding support for Regional Tourism Industry Associations (RTIAs) changed dramatically, and strong grassroots leadership took on new significance; a challenge for which Parrisboro Shore is now better prepared.

Building Blocks of Parrisboro's Plan

The Parrisboro STEP Plan was thoughtfully prepared and captured insights from influential plans and research, extensive community and Working Committee input and the practical insights gained from working through tactics.

Benchmarking

As a tool to gauge the "tourism temperature" of Parrisboro Shore as the project began (late summer 2015), the *Sustainable Tourism Community Screening Tool* was completed by all Working Committee members; important insights from Screener responses helped shape the Plan. Respondents rated the area as beautiful and unique; an area which appreciates its culture and the environment and a population that generally supports tourism as a tool for community growth. However, the same respondents acknowledged that tourism leadership has been weak; there was no tourism growth plan in place and the area is considered highly seasonal in nature. **It is recommended that periodically (every 18 months beginning in January 2017) the Screening Tool be administered to a group of community members, tourism influencers and leaders as a way to measure progress over time.** Aggregated Screener results from July 2015 are outlined in Appendix 2 of this plan.

Community Input

Broad community support for tourism, driven by measurable successes, is essential for progress. A positive business and resident attitude toward initiatives and investments that support tourism enables governments to dedicate human and financial resources to the sector; it engages the spirit, expertise and enthusiasm of residents in new programs; motivates operators to expand and invest; generates vocal ambassadors and generally makes a community a more welcoming place to visitors. Community support should never be underestimated and when the community at large is regularly involved tourism development benefits!

Important elements considered in developing this plan were drawn from a well-attended and energetic, *Ideas Generation Workshop* in September 2015 where **xxx tourism** operators, local business people, municipal leaders and interested residents participated. They offered their insights and thoughts regarding the assets of the area (to feed the Tourism Asset Inventory, see below), described their ambitions for Parrsboro Shore tourism and identified ways to “get the job done”. The ideas generated from the workshop are detailed in Appendix 3. The formal workshop evaluation reflected its value to participants. Workshop participants contact information was collected and fed into the project database.

Tourism Asset Inventory

During industry/community and Working Committee meetings throughout plan development, key tangible and intangible tourism assets of the area—the building blocks of outstanding visitor experiences—were identified. As part of this plan, an inventory was designed to view the area’s assets through a lens of the components which generate tourism success. The this inventory, updated and used effectively, will also expose gaps in tourism experiences and services and highlight tourism opportunities along Parrsboro Shore. During the Working Committee meeting in June 2016, the inventory was updated for future use. The Tourism Asset Inventory is included in Appendix 4.

Research and Documents’ Review

Research, interviews and environmental scanning conducted to prepare the plan was extensive and continued throughout the course of the project. It is outlined in Appendix 5.

The Customer & the Market

“The customer is king”.

Understanding the visitor who chooses to travel throughout Nova Scotia, especially to the Bay of Fundy and Annapolis Valley Region; what that visitor seeks and expects in an experience; and Parrsboro Shore’s ability to satisfy expectations and deliver on the tourism experience it “promises” visitors, are critical to structuring this strategy.

Every plan to enhance tourism and to build engaging visitor experiences must be customer-focused to succeed. In seeking to craft recommendations for the Parrsboro Shore STEP Plan, particular attention was paid to developing a demographic and motivational snapshot of the visitor who is intrigued to travel to Atlantic Canada, to Nova Scotia and ultimately to the Bay of Fundy/ Annapolis Valley Region...and Parrsboro Shore. In building recommendations, focus was placed on historical visitor information, forward-looking studies and reports and insights from the fresh market segmentation approach, utilizing Explorer Quotient (EQ), revealed by Tourism Nova Scotia in November 2015.

Atlantic Canada: Tourism Overview

Tourism generates \$4.5 billion in non-resident visitor spending throughout Atlantic Canada. It supports more than 9,700 businesses and accounts for 3.9% of the regional GDP. Rooted in the *ACOA Growth Strategy for Tourism: The Right Products Drive New Demand*, ACOA-Tourism Atlantic has a goal, vision, mission and clear objectives to grow this economic sector. Tourism Atlantic generates visitor projections at a high level, to help guide tourism planning. Canada’s overall tourism sector has been sluggish in recent years and therefore expectations for growth in this region are guarded. Leading up to an including 2017, Atlantic Canada can expect:

- Low, single digit growth in visitation from other parts of Canada—primarily from Ontario and Quebec.
- Low single digit growth from the United States—primarily New England and Mid-Atlantic states.
- Slightly higher growth from overseas markets of the United Kingdom, France and German speaking Europe but on a much smaller base of visitation.

That being said, the bigger source of visitation within each province and throughout the region is local residents travelling locally, and Atlantic Canadians traveling within Atlantic Canada. These regional numbers are not projected by ACOA-Tourism Atlantic.

The Atlantic provinces marketing collective, the Atlantic Canada Tourism Partnership (ACTP) has identified target markets for Atlantic Canada. Described in Explorer Quotient (EQ) terms these markets are:

- *Exurban Explorers* (affluent, middle-aged to older, primarily couples)
- *Outdoor Experiencers* (younger to middle-aged couples, some with kids)
- *Young Families* (affluent and travel with children still at home).

Details of these target audiences and their profiles are included in Appendix 6.

Nova Scotia Tourism Overview

Non-Resident Visitors:

Comment [David Bea3]: Could most or all of this be placed in an Appendix?

Tourism Nova Scotia, on or about every four (4) years, conducts an in-depth Exit Survey of non-resident visitors to this province; the wealth of information harvested directly from departing visitor is compiled in the provincial survey, and feeds tourism planning. An extensive Exit Survey was conducted throughout Nova Scotia in 2015, the results of which are expected in late fall 2016 according to Tourism Nova Scotia; however, results were not available at the time of writing this Plan.

The *Visitor Exit Survey (VES) 2010* was used for guidance with in report. It profiles non-resident overnight visitation to the province for the calendar year 2010, indicating that among non-resident visitors:

- 50% of them are 55 years and older; an additional one-third are 45 to 55
- Vast majority (87%) are repeat visitors who are primarily motivated to visit friends and relatives (VFR)
- Nova Scotia's non-resident visitors are educated, 74% hold a diploma or a university degree
- Most arrive in their own vehicles and 56% enter through Amherst
- 37% of non-residents visiting NS make the Bay or Fundy/Annapolis Valley a destination during the trip – the highest rural visitation in NS behind HRM at 70+%. Cape Breton Island was visited by 19% of non-resident visitors in 2010
- Average spend in the region is \$1,262 (2010) – higher than the provincial average spend
- Visitors travel predominantly from June to September.

Activities and attraction's chosen by non-residents during their visits are aligned with the nature of those offered and growing along the Parrsboro Shore. They are outlined in Table 3 in Appendix 6.

Resident Visitors:

Nova Scotians travelling within Nova Scotia account for the most trips to/within the province annually, but resident visitors spend less overall than non-residents. There are an estimated 2 million overnight trips annually, and 7 out of 10 travelling residents stay with friends. The *2010 Travel Survey of Residents to Canada (TSRC)* reflects most resident travel movement is from July to September, but the months of October to June indicate evenly distributed travel.

Nova Scotia: Moving Forward

Tourism Nova Scotia has accepted the challenge of doubling its tourism revenues (\$2.34 billion in 2013) by 2024; a 10-year challenge originating with the Ivany Report. In order to meet that challenge, the province is focusing its efforts and its priority budgets on:

- Encouraging first-time visitors to the province, who spend more than repeat visitors
- Concentrating on markets of highest return, including entering the China market and improving air access from key markets
- Offering world class experiences and partnering with operators to get there
- Building tourism industry confidence and sharing our outstanding tourism stories.

Building one strong and identifiable Nova Scotia Brand; one that intrigues the interests and imaginations of target groups, is essential. The Brand Statement for Nova Scotia is in development now; **it will be important for Parrsboro Shore to understand, embrace and complement the Nova Scotia Brand.**

Importantly, five Nova Scotia Icons have been identified based on visitor interests; the Bay of Fundy is key among the icons. The powerful Bay has international recognition and deserves to be showcased with world-class experiences. The Parrsboro Shore has unique "advantages" and perspectives within

this important icon; key elements around which to build and polish outstanding experiences; Parrsboro Shore is ideally positioned to win fresh recognition and revenues!

In 2016, Tourism Nova Scotia devoted resources to more deeply understanding the values, motivations and behaviors of target visitors to inform development and marketing initiatives. Immediate focus for TNS are visitors described as *Authentic Experiencers* and *Cultural Explorers*.

Operator understanding of visitor motivations will be increasingly important in tourism planning and development and Parrsboro Shore needs to stay alert to this fresh information.

Visitation: Parrsboro Shore

Visitation information for Parrsboro Shore is imprecise and is gathered from a number of sources to cobble together a snapshot of visitor movement. Number of rooms occupied in fixed roof accommodations and campgrounds is managed by the province, based upon industry reporting. Annualized occupancy in Parrsboro and area has since 2012 remained relatively stable and runs on average about 10 points below the provincial average (outside Halifax). However, information reported in 2015 and year-to-date 2016 reflects occupancy increases that are positive indicators for tourism growth:

- 2012 – 38% overall occupancy, peaking at 60% in August 2012
- 2013 – 39% occupancy, again with August the highest at 63%
- 2014 – 34% occupancy to mid-season however reporting was incomplete and final number was not provided
- 2015 - Occupancy from May to September was 41%, peaking in July and August with September at 50%.
- YTD 2016 – From May to August overall occupancy is 48.4%, with increases over July and August 2016.

Progress is being made, but there is room to grow.

Fundy Geological Museum is a key motivator to the area and, according to its own numbers, has averaged 22,000 visitors annually from 2010-2014. During 2015, the Gem and Mineral Show with a 30-year history attracted some 2,000 visitors. Visitation documented to the interpretation center at Fundy Ocean Research Center for Energy (FORCE) in 2015 was 5,000 and some 55,000 people stopped at the provincial Visitor Information Center at Amherst in 2014. **It is important for Parrsboro Shore to work with NS Tourism to find manageable and relevant ways to measure travel to the Shore and therefore monitor progress, and build the confidence of partners and potential project funders.**

Context for the Parrsboro Plan

Environment scanning and input from industry/ community consultations influenced development of the capacity building sessions/ developmental workshops of STEP Parrsboro and the final Plan recommendations. Overall there are key insights that served as context for the plan; they are:

- ✓ Bay of Fundy has international renown and celebration as a natural phenomenon of massive scale! Nova Scotia strives to differentiate from New Brunswick's Bay of Fundy, and within the province there are key differences:
 - Parrsboro Shore has "horizontal" ground-level views of the Bay and key assets/resources to experience the Bay itself, the wonders and the stories it generates. Assuming the lower Bay is acknowledged for its whales; that Truro area claims Gateway/ tidal bore viewing and rafting status; the Annapolis Valley is recognized for wines, agriculture, the Grand Pre landscape; then Parrsboro Shore contributes experiences of dinosaurs, fossils and Bay of Fundy access.
- ✓ Bay of Fundy is identified by Tourism NS as an "icon" of the province, one of five, and will play actively in provincial tourism planning and marketing. There are resources/ assets along the Shore in place to support this icon. Among them:
 - Fundy Geological Museum – Dinosaurs, fossils, experiences and interpretation
 - Gem & Mineral Show
 - Ships Company Theatre
 - Age of Sail Museum
 - Parrsboro Creative
 - Parrsboro downtown with meeting places and retail.
- ✓ The relationships for tourism development are moving away from centralized RTIAs to more community-based leadership.
- ✓ Parrsboro Creative is evolving, planning and taking shape; it has the potential to be a differentiator for the Shore.
- ✓ Parrsboro Shore has brand-consistent & strong partners in play and in the wings: i.e. Joggins Fossil Institute; FORCE; Nova Scotia Museum; Masstown Market.
- ✓ Parrsboro Shore is well-positioned geographically for growth: close to Halifax yet distant enough to be considered "an overnight" and close to Amherst entry point.

STEP Sustainable Tourism Plan: Parrsboro Shore

The STEP Sustainable Tourism Plan for Parrsboro Shore was crafted and supported with direction and full participation from the STEP Parrsboro Working Committee.

Guiding Principles

Six guiding principles are the philosophical elements upon which the Plan is built. They are:

- Visitor focus is of foremost importance in everything we do
- Optimizing strong, existing assets and connecting-the-dots can be profitable
- Commit to evolving world-class experiences and "learn from the best"
- Adhere to pillars of Sustainable Tourism:

- satisfying needs of visitors and residents
 - safeguarding natural, cultural and historical resources while
 - contributing to the economy and community quality of life
- Communicate effectively everyday with visitors, partners, residents and stakeholders
 - Work collaboratively and cohesively among local operators and with provincial and regional efforts to reach target markets.

Tourism Goal: Parrsboro Shore

By 2020, the Parrsboro Shore is recognized as the outstanding Bay of Fundy destination for coastal geology and dinosaurs, the power of the Fundy tides and cultural participation.

Parrsboro Shore will contribute to Nova Scotia’s Tourism Strategic Goal of doubling tourism revenues, by growing at a pace faster than annual provincial growth and being recognized primarily, within Nova Scotia’s primary target markets.

Parrsboro Shore tourism economy will grow at a rate that contributes strongly to Nova Scotia’s goal of doubling tourism revenue

Comment [David Bea4]: This statement should be deleted.

Recognizing the Bay itself and its tidal phenomenon as “The Big Show”, Parrsboro Shore specifically offers unique and authentic experiences associated with:

Primary Motivators:

- Bay of Fundy features of dinosaurs, fossils, tidal experiences/adventures and unique stories.

Secondary Motivators:

- Flourishing and productive cultural community – Creative Campus; visual artists; live theatre; craftspeople
- Brand consistent festivals, events and museums
- “Gems” to visit – shops, photo and rest spots, beaches, blueberry fields
- Clams and locally produced foods.

Tourism Objectives: Parrsboro Shore

To realize the Tourism Goal, Parrsboro Shore focused on five (5) objectives that worked together to:

- 1. Develop, enhance and deliver outstanding Parrsboro Shore-specific, Bay of Fundy experiences generating longer stays and increased expenditures.**
- 2. Action key opportunities for cultural development.**
- 3. Work as active Ambassadors for the Parrsboro Shore as a tourism destination.**

Comment [David Bea5]: In collaboration with Parrsboro Creative

4. Communicate ONLINE creatively and precisely, speaking to target/niche visitors.

5. Benchmark, measure and report progress.

Plan Accomplishments 2015-2016

In order to execute the capacity building actions outlined under each objective, the Working Committee recruited industry/ community volunteers to help as “fresh legs” for short term/ project assistance. The workshops and activities completed during the STEP Parrsboro year-long project are also summarized in Table 4, page 16.

The Working Committee accomplished a great deal during the course of this project and Parrsboro Shore will reap benefits for years to come.

Objective #1: Develop, enhance and deliver outstanding Bay of Fundy Experiences generating longer stays and increased expenditures.

The Working Committee focused efforts on four priority actions:

- Provide tourism operators with hands-on opportunities and step-by-step skills to generate and offer outstanding experiences
- Enhance existing festivals and nurture new shoulder season events/ festival to drive new visitation
- Equip local operators with a “toolkit “of practical, how-to information to raise the bar in terms of customer experience/service in the area
- Gain third-party insight into tourism offers and practises along Parrsboro Shore.

Accomplishments:

Experience development is at the heart of STEP, and operators along the Parrsboro Shore embraced opportunities to be better informed and put the knowledge to work.

- 1) **APRIL 2016** – At request of STEP Working Committee, Gros Morne Institute for Sustainable Tourism (GMIST) coordinated a 36-hour experiential development session to inspire products that highlight Parrsboro Shore key motivators. Adventure operator Perry Gotell, Tranquility Tours, PEI and cultural festival organizer, Shirley Montague, Trails, Tales & Tunes (TTT), Gros Morne, NL, shared their experiences on “overcoming the odds” and achieving tourism success in rural Atlantic Canada. GMIST Director Jonathan Foster followed with an experience development how-to.

As a value-added feature of the Workshop, lunch consisted of featured selections from the menus of local restaurateurs.

The following morning **4 operators** who requested individual time, met in small conversation groups with Perry and Jonathan. Local organizing committee members for a new festival met with Shirley.

Results:

- **Xxx Tourism stakeholders** attended the workshop session. Feedback was positive and asked for “more like it”.
- **Four (4) operators** met separately for personalized attention and recommendations.
- **Shirley Montague** provided to festival organizers the Operations Manual for TTT, build from 10 years of experience.
- A “how to develop a rich experience” handout was provided to all from GMIST.
- **Seven (7) restaurateurs** shared featured items for lunch.
- **Feedback from all was excellent.**

Comment [David Bea6]: Three

2) JULY 2016 – As a result of industry feedback from the first session, GMIST was requested to coordinate an experience development session focused on enhancing guided tours. GMIST secured Cal Martin, Frog in the Pocket Consulting to deliver a morning workshop open to all and then walk-through specific tours with providers for on-site assessment and recommendations. This hands-on approach was well received.

Results:

- **Despite the July timeframe and operator commitments, xxx stakeholders** attended the session, including new participants planning tourism experiences in 2017
- **Four (4) - 4-hour mentoring sessions** were held with local operators planning and providing tours. Suggestions for enhancements and tour expansion was made to each, and several suggestions were incorporated in 2016 and for 2017 planning.
- **A Planning a Great Tour checklist** was provided to all participants from Cal.
- **Elements from the workshop session** was incorporated into fresh brochure material for Fundy Geological Museum.
- **Feedback from all was positive.**

Comment [David Bea7]: Note sure about this, Taylor to confirm

3) Customer service training was considered a priority by the committee and pre-season timing considered essential.

MARCH & JUNE 2016: In cooperation with TIANS, the Working Committee offered World Host training to operators at two sessions. A cross-sector of industry sector participated.

Results:

- **In March, 18 participants** were certified
- **In June, another xxx frontline staff** were World Host certified.

4) In an effort to “raise the experience bar” within the local industry and equip operators with practical and relevant information to a Parrsboro Shore Operator Toolkit was organized.

SEPTEMBER – NOVEMBER 2016: Developed under contract with a consultant, the Toolkit (being finalized as this report is completed) will be distributed to ALL operators. It includes resources, visitor profiles & numbers, experience development tools, contact information, mentoring information, best practises and background information to assist tourism operators throughout the Parrsboro Shore. The toolkit will reside online and be updated on a regular basis.

Results:

- Multi-faceted toolkit developed for broad circulation.

Objective #2: Action key opportunities for cultural development.

Rather than undertake distinct cultural development initiatives that might be redundant, **the Working Committee chose to move the cultural tourism agenda forward by equipping and enabling operators to share the experiences they now offer, and to learn from proven experience.** Parrsboro Creative was considered the over-arching cultural partner throughout STEP and going-forward.

Results:

- Cultural operators, festival organizers and cultural stakeholders were invited, and some attended, all STEP workshops and initiatives.

Objective #3: Work as active Tourism Ambassadors for the Parrsboro Shore

The Working Committee's ambassador efforts focused on empowering the local industry and residents to share the stories of the Parrsboro Shore circulating information on Parrsboro Shore activities and sharing it strategically.

- 1) **MARCH – MAY 2016:** Ambassador lunchtime learning sessions, including resources, were conducted throughout March and into May for interested operators, community residents and volunteers.

Results:

- xxx individuals, operators and residents participated in the sessions.

- 2) **MAY 07- 2016:** Parrsboro Shore Tourism Hospitality Fair.

Comment [David Bea8]: Suggest dropping the word "hospitality"

Considered an important project success and confidence-builder for the STEP initiative along the Shore, the Fair attracted tourism operators from all along Parrsboro Shore participate who exhibited their services, sold products. The objective of the Fair was to equip operators and residents' alike details of activities/ opportunities available along the Shore to offer referrals to visitors over the upcoming months. This was accomplished in a colourful and celebratory way. Held at the Parrsboro Legion, the program included short presentations from three speakers and live music. A small sub-committee organized the effort and promoted it, and conducted an unofficial evaluation (positive all round!) and recommendations for 2017. A newly minted Calendar of Events (see Objective 5) was an important tool for the Fair.

Results:

- 30+ exhibitors participated in the Fair
- Xxx people attended the Fair from Parrsboro and surrounding areas
- Media coverage included xxxxxxxx

- 3) **May 07-2017: The Hwy 2 Adventure- 'A Shore Thing'** Training Day. Organized as a “progressive fam tour” with operators joining the journey along the way, the training session brought operators by motor coach from Masstown to Parrsboro for the Fair The events included sessions for operators to share their plans for 2016 and for residents to have a preview of what will happen and for which residents can act as ambassadors. As part of the Fair, teach other’s tourism plans and offers.

Results:

- *Xxx operators participated in the tour which visited xxx sites along the way.*

Objective #4: Communicate Effectively; Especially Online

The Working Committee recognized the importance of strategic, timely and well-positioned communications to the success of tourism and the Sustainable Tourism Plan along Parrsboro Shore. However, in 2015-2016 available resources were prioritized and focused on experiential development and ambassador effort. However, **two communications were accomplished.**

- 1) **APRIL 2016** - Parrsboro Shore consolidated Calendar of Events for tourism activities and events. The online/ offline calendar of events was generated and dynamically updated throughout the season to ensure visitors has information on “what’s going on” along Parrsboro Shore in advance of and during their visits; to be available to operators and VICs to circulate to visitors; to proactively “seed” in areas where the information is not broadly available. A printed version was available for circulation at Saltscapes Visitors’ Expo in April.

Comment [David Bea9]: Question for Taylor – Did this Calendar actually get updated?

- 2) **NOVEMBER 2016** – Executive Summary, STEP Parrsboro Sustainable Tourism Plan is available online and circulated broadly as a tool to demonstrate the accomplishments of the STEP project and recommendations for future initiatives.

Results:

- *Calendar developed with xxx entries of Parrsboro Shore operators*
- *Xxx calendars distributed at Saltscapes Expo*
- *Xxx distributed along the shore throughout the summer months*
- *Posted online www.townofparrsboro.com*
- *Executive Summary of the plan presented and circulated on November 03-2016.*

Objective #5 Benchmark, measure and report progress

The Parrsboro Shore Plan’s Goal states “Parrsboro Shore will contribute to Nova Scotia’s Tourism Strategic Goal of doubling tourism revenues, by growing at a pace faster than annual provincial growth”; we need to understand the point from which the journey begins. The Research Team at Tourism Nova Scotia was identified as a major resource in developing an evaluation plan and a partner in helping deliver and interpret it.

Comment [David Bea10]: Please use revised wording for the goal

Key Activities: STEP Parrsboro

The major, benchmark activities of STEP Parrsboro are reflected here.

Table 4

Comment [David Bea11]: Is this something yet to be developed?

Go-Forward Recommendations 2017 - 2020

The STEP Parrsboro Working Committee achieved milestones and progress throughout 2015 and 2016. In moving forward, the recommendations offered for 2017 -2020 align with the Guiding Principles, Tourism Goal and Objectives agreed upon during the STEP process. The Go-Forward Recommendations are in four categories of *Keep the Plan Relevant!*, *Experience/ Product Development*, *Capacity Building* and *Marketing*; they are designed to continue the momentum generated by STEP Parrsboro.

	<i>Recommendation</i>	<i>Lead</i>	<i>Timeline</i>
<i>Keep the Plan Relevant!</i>	Establish tourism leadership model for Parrsboro Shore (PS) to drive the Plan to 2020.	PS Working Committee/ Municipality	In place by January 2017
	Work with Municipality to identify a staff “point-person” and sources for funding to support Plan priorities to 2020.	Leadership Team/ Municipality	In place by January 2017
	Ask tourism leaders & influencers to update the Tourism Community Screener to assess progress since 2015.	Leadership Team	March 2017; subsequently every 18 months
	Update Tourism Asset Inventory annually; review for gaps and opportunities	Leadership Team/ Municipality	Annually
	Update Visitor Data with information from NS 2015 Exit Survey and EQ updated information	Leadership Team	For 2017
	Ensure achievable measures to track progress/ success are identified (2016) and reported annually to the industry.	Leadership Team	2017 - 2020
<i>Experience/ Product Development</i>	Undertake an Accelerated Market Readiness (AMR) initiative with operators along PS. In 2017 involve 5 to 10 operators. Contact: Johanna Egan, Tourism Atlantic-ACOA; johanna.egan@canada.ca	Leadership Team/ Municipality/ NS Tourism/ Tourism Atlantic	July-September 2017. Additional years pending operator interest.
	Survey PS operators for preferences/ needs re: professional development sessions for 2017/18. Consider PD/ BP sessions online & social media, small business development & St. John Ambulance	Leadership Team	November 2017, beginning with Plan Presentation

	Work with Tourism NS to offer Best Training and experience training sessions as indicated by the operator survey	Leadership Team/ Tourism NS	As required for 2017-2020
	Support efforts of the committee working to develop a brand-consistent, Global Geopark in the region	Leadership Team	On-going to 2020
	Continue to leverage priorities of Parrsboro Creative into Plan activities, capturing cultural tourism opportunities.	Leadership Team/ P-Creative	On-going to 2020
	Festival planning: Support planning efforts (underway) for new season-extending fall festival and enhancements to the established Gem & Mineral Show	Leadership Team	As required
Community Capacity Building	Develop Parrsboro Shore Ambassador Program including Tourism Fair and operator familiarization initiatives.	Tourism Fair sub-committee/ operators	May 2017. Annual evaluation drives planning for subsequent year.
	Identify <u>priority</u> game-changing infrastructure for PS. Consider tourism goal, brand-consistency, uniqueness, and opportunity to connect-the-dots among primary and secondary motivators. Use Tourism Inventory + visitor information to inform.	Focused brainstorming session among key stakeholders	2018
	Continue World Host training with frontline staff	Leadership Team/ TIANS	May/ June 2017; 2018-2020 as required.
	Update Operator Toolkit		January 2018
Marketing	Discuss with Municipality next-steps for positioning of PS tourism information on centralized website site including coordinated approach to social media connections/positioning of Route 2 as “the road to the Bay of Fundy” in Nova Scotia.	Leadership Team/ Municipality	
	Enhance placement & use of online Calendar of Events as important visitor & operator tool	Leadership Team	2017
	Ensure branding effort align with Municipality and provincial efforts.	Leadership Team	2017 - 2020

Appendix 1: STEP Parrsboro Working Committee

David Beattie - Gillespie House Inn & Parrsboro Board of Trade (Chair)

Michael Fuller - Parrsboro Creative & Art Lab

Natasha MacLellan – Ship’s Company Theatre

Tom Fedak - Fundy Geological Museum & Geopark initiative

Ron Shaw – Former Counsellor, Town of Parrsboro

Taylor Redmond - Town of Parrsboro

Michele Byers – Municipality of Cumberland

Ex-Officio:

Mechele Scott, ACOA

Nick Fry, Tourism Nova Scotia

Raymond Hickey, Town of Parrsboro

Appendix 2: Tourism Screener Aggregated Results

October 2015

Tourism Screener Aggregated Results (Industry Scores)

Notes: FGM Screen was generated through the lens of developing a Geopark/ Parrsboro Golf Course indicated community involvement at a reduced level/ Marsha’s not included.

A: Tourism Assets

- Area is naturally beautiful and unique
- Has many cultural activities and assets; Rated as high in overall appeal and unique identity (D-3); Rated highly as respectful of culture and tradition architecture (F-2)
- No “larger events” or experiences

- Underutilized seasonally *** (2/5)

B: Community Support

- Local support for tourism is viewed as very good
- Leadership is “below average” – who is the leader? Where is the plan?
- There is “acceptably good” cooperation within the community *** (7/10)

C: Tourism Planning and Management

- Inventory of Assets incomplete *** (4/10)
- No evidence of Planning/ strategy in plan *** (3/10)
- Tourism sector is poised for growth and there is private investment

D: Community Attributes

- Area viewed as having services appropriate to visitors including critical mass of offers
- Inadequate transportation access to the region Not something STEP can address
- Acceptable availability of workforce – training program and incentive is suggested.

E: Environmental Practices

-Generally viewed as an area who appreciates, understands and “protects” the environment

F: Social Practises

- Community rates highly on being committed to reasoned and managed tourism development as a tool for community growth.

G: Economic Practises

- Generally, feel area has the financial capacity to sustain tourism development
- There appears to be a gap in the community’s commitment or ability to commit to business and employee training *** (2.5/5)

Appendix 3: Industry/ Community Idea Generation Session

Community Meeting: Assets Identified (plenary session)

Excellent winding roads along the ocean
Ships Company Theatre
Fossil Cliffs
Age of Sail Museum
Cape D'Or
The Tides
Advocate Harbour Driftwood Beach
FORCE
FGM and Wasson's Bluff
Dinos!!!
Ottawa House
Mini-Cabot Trail
Clams
Super sunsets
Wild Caraway
Unexpected outstanding views
Waterfalls
Hiking Cape Chignecto
Dark Sky and Stars
Fall colours and red blueberry fields
Artistic community
Not since Moses
Beaches and solitude

Community Meeting: Goals for Tourism (Reports from 3 groups)

Encourage more families to learn about science and history
Make more money
Effective signage
Professional standards in Customer Service
More experiences to entice people
Re-locate the tourist bureau
More after hours' business and activities: food drink and entertainment
Regular collaboration and cooperation among stakeholders
More and diverse opportunities to eat
Transportation services for visitors
Reverse "there's nothing to do" attitude
Collaborate with similar niche markets, outside the area
Skilled workers job bank: alternating days off
Coordinate business closing hour

More advertising \$\$
Long term employment
Make more \$\$ from tourism = better community services/ safe and secure community
Clean community and environment
Excellence
More community buy-in
Developing an Artists Community
Identify our uniqueness

Fill accommodations/ increase the number of accommodations
Make money
Lengthen the season
Broaden the demographic: older to younger
Broaden experiences offered
Increase critical mass of visitors & investment by the private sector
Increase awareness of the Parrsboro Shore
Build in Niche Markets = foodies/ bass fishing/ snowmobiling

Make money
Make sure events that are happening are visible
Work together
Make the experience affordable
Define our offer
Fill the gaps
"Claim" Bay of Fundy
Create an awesome gateway
Pick a sustainable season
Get the community involved
Precise online messaging
Have itineraries for guests to experience – collect these itineraries/ Top 5

Community Meeting: What's Special and what to do about it? (3 groups)

Understand where these is a critical mass of activities = antique/ minerals/ clams
Festivals – create a ***Festival of Tides***
Re-frame existing events and festivals for visitors
Highlight the accessibility of Bay of Fundy in in area (the vertical view)
Encourage outdoor activities

Tour with an antique buyer
Pat @ the museum offers a "blueberry experience"
Should we have a Tour Broker = assembling experiences/trips
Niche: Fathers of Confederation
We have dinosaurs!!!!
- Unique geology

- Operational lab
- The Ship is NOT typical summer theatre

What's Special?

Fossils and Minerals
 Sea Floor Experience
 Creative Campus for Art – Courses
 Crafts and Artisans
 Culinary experiences with Blueberries/ cheese and local products (& clams?)
 Dinosaurs are unique and appealing
 Certain aboriginal stories are unique and appealing
 Artists community is appealing
 Maritime history is appealing
 Tides/ horizon/ scenery = unique and appealing
 Rock and mineral collecting is unique and appealing to some
 Dark sky/ fresh air

What to do?

We need to have coordinated & united marketing
 Fossil collecting somehow other than removing important pieces
 Develop singular identity for international recognition
 Building packages
 Improve the perception of the journey=sign and roads
 Expand the museum's experiences
 Coastal experiences
 Collaboration along the whole shore
 Offer a variety of products and services
 Package the products we have
 Promoting an inclusive community

What's unique?

FORCE
 Highest Tides
 Hiking Cape Chignecto
 Unspoiled Scenery
 Green Energy – Green Tourism
 Art on the street
 Shipbuilding history
 Advertising inclusiveness-dog friendly/ gay friendly

Appendix 4: Tourism Asset Inventory

SUCCESS COMPONENTS	Parrsboro Shore Status	Gaps/Opportunities
1. PRIMARY MOTIVATORS: Quality, market ready EXPERIENCES that can on their own, generate new visits from market segments.		
☑ Major attractions/ festivals	<ul style="list-style-type: none"> Coastal/ beach access to B of F Fundy Geological Museum & dinosaurs Eldon George Collection 	<ul style="list-style-type: none"> Keep people as the tide turns Global GeoPark proposal in prep Webcams
☑ On-site experiences/Special interest activities	<ul style="list-style-type: none"> Wasson Bluffs guided walks & safari, FGM B of F kayak & zodiac water adventures 	
☑ Scenery/natural areas	<ul style="list-style-type: none"> Iconic B of F vistas = Five Islands, Economy Mountain & Advocate Harbour Low Tide horizontal vistas 	<ul style="list-style-type: none"> Rest stops & interpretation
☑ Parks/ trails/ adventures	<ul style="list-style-type: none"> Cape Chignecto Five Islands Provincial Park 	<ul style="list-style-type: none"> Incorporate both parks more fully in the Parrsboro Shore experience
☑ Cultural attractions/ events		
2. SECONDARY MOTIVATORS: Market-ready products that do not motivate a visit, but are of sufficient interest to extend a stay and increase expenditures while at the destination.		
☑ Developed attractions/ festivals	<ul style="list-style-type: none"> F.O.R.C.E & interpreted tours Age of Sail Museum & Cafe Gem & Mineral Show Parrsboro Film Festival Not Since Moses Run 	<ul style="list-style-type: none"> Interactive experiences/ festival site Show expansion/ enhancement into community Festival focused on B of F tides
☑ On-site experiences/Special interest activities	<ul style="list-style-type: none"> <i>From Field to Fork</i>: Blueberry experience <i>Spirit Reins</i>: Tours of beach and trails on 	

	horseback	
☒ Scenery/natural areas	<ul style="list-style-type: none"> • Many scenic views coastal and inland, blueberry fields • “Photographer’s light” • Long, solitary beaches 	<ul style="list-style-type: none"> • Self-guided & interpreted tours
☒ Parks/ trails/ adventures	<ul style="list-style-type: none"> • Five Island Park • Advocate Harbour Driftwood Beach • Partridge Island Trail & Look off • Waterfalls/ waterfall hiking 	<ul style="list-style-type: none"> • Mi’kmaq interpretation of Glooscap • Sculpture contest with driftwood • Ongoing maintenance
☒ Cultural attractions/ events	<ul style="list-style-type: none"> • Ship’s Company Theatre • Cultural Campus courses • Art Lab & Gallery • Recognized artists & galleries; Joy Laking, Arlene Collins, Heather Lawson • Street/community sculptures • Special events & gallery, Main & Station • Parrsboro Band Stand & weekly concerts 	<ul style="list-style-type: none"> • Artist residencies • Better integrate into extended experiences & festivals
☒ Community events/ local attractions	<ul style="list-style-type: none"> • Attractive & active main street • Seasonal events • Canada Day • Parrsboro Golf Course • Old Home Week • Vintage Christmas Weekend 	
☒ Character inns, B&Bs	<ul style="list-style-type: none"> • Gillespie House Inn & Retreats • Maple Inn • Parrsboro Mansion • Lightkeepers Guest House 	
☒ Evening entertainment	<ul style="list-style-type: none"> • Weekly movies • Concert Series at The Hall 	
☒ Local museums/ historic sites	<ul style="list-style-type: none"> • Ottawa House, interpreters, special events & café • Spencer’s Island 	
☒ Quality dining, regional cuisine	<ul style="list-style-type: none"> • Wild Caraway dining • Black Rock Bistro • Locally produced cheeses 	<ul style="list-style-type: none"> • Clams as a local specialty
3. TRAVELER SERVICES: A cross-section of services for visitors.		
☒ Accommodations - Fixed Roof & Campgrounds	<p><u>Fixed Roof:</u> Gillespie House -7rms; Maple Inn – 8 rms; Parrsboro Mansion – 4 rms; Evangeline’s Tower – 4 rms; Sunshine Inn – 15 rms; Tidal River Ridge – 4 chalets; Driftwood Retreat – 5 chalets; Riverside Cottages – 18 cottages; Cap D’Or Lighthouse – 4 rms; Wild Caraway – 2 rms; Four Seasons Resort</p> <p><u>Campgrounds:</u> Glooscap; Spencer’s Island; Five Islands; Advocate Harbour</p> <p>TOTAL: 44 rooms and 22 cottages in Parrsboro area; 21 rooms and 7 cottages + on Parrsboro Shore.</p>	

☒ Restaurants/Food Service	Glooscap; Harbourview; Black Rock Bistro; Porch Light; Tim Horton's; Wild Caraway; Advocate Country Store; Station and Main Cafe; Diane's (clam specialty); Granny Franny's; Spencer's Island Beach Cafe; Age of Sail Café <ul style="list-style-type: none"> • Wild Caraway caters 	
☒ Easy Access to Information, Reservations, Visitor Services	<ul style="list-style-type: none"> • Provincial VIC at Amherst (year-round) • Parrsboro VIC (seasonal) 	<ul style="list-style-type: none"> • Area/ tactic for sense of arrival • Partnership with Masstown Market
☒ Quality Travel Routes and Signage.		
☒ Trained Staff & Professional Service	<ul style="list-style-type: none"> • Talented individuals available • Succession planning needed 	
☒ Safety (Security/Health; Medical)		
☒ Shopping	<ul style="list-style-type: none"> • Cross-section of options from fashion, local design & products, crafts, giftware, jewelry, artworks on Main Street and other areas. • Groceries, drug store and dry goods available 	<ul style="list-style-type: none"> • Questions regarding open hours in evenings
4. EFFECTIVE LEADERSHIP: Critical element of tourism success.		
☒ Champion, Leader	<ul style="list-style-type: none"> • Chair and Co-Chair for STEP + Working Committee 	
☒ Industry Organization	<ul style="list-style-type: none"> • No municipal/ regional tourism committee • Some operators members of CNTA 	
☒ Political Climate	<ul style="list-style-type: none"> • Town is proponent for STEP; many priorities demand attend for limited resources 	
☒ Cluster Development i.e. "Clustering" by theme, mapping or physical proximity	<ul style="list-style-type: none"> • Assets exist for clustering in dinosaurs/fossils, tidal adventures & festivals 	
5. EFFECTIVE MARKETING		
☒ Strategic, specified target markets, promotion, branding.	<ul style="list-style-type: none"> • Town website has tourism page • Many operators are online • No regional marketing profile online • Questions around CNTA future marketing efforts 	<ul style="list-style-type: none"> • Focus on marketing products/ experiences in which the community advantage • Collaborate with Region and Provin maximize impact • Focus online efforts

Appendix 5: Research/ Environmental Scanning Materials

Online/ offline documents reviewed included but was not exclusive to:

- Fundy Shore Eco-Guide
- A Tourism Strategy for Nova Scotia
- 2016 Tourism Nova Scotia Planning Documents
- Sustainable Tourism Community Screening Tool; Parrsboro Shore 2015
- 2010 NS Visitor Exit Survey
- 2010 NS Visitor Exit Survey – Regional Report (Bay of Fundy and Annapolis Valley)
- Bay of Fundy regional Interpretation and Attraction Development Plan, March 2010
- www.novascotia.com
- www.town.parrsboro.ns.ca
- www.parrsborofilmfestival.com
- www.parrsborocreative.com
- www.fundygeological.novascotia.ca/gemshow
- www.bayoffundytourism.com
- <https://tourismns.ca/tourism-industry-research-services> on Key Market Profiles/ information from VICs
- Assessment Findings and Suggestions – Parrsboro to Joggins Area; Destination Development International (Roger Brooks)
- Video: Parrsboro and Cumberland County
- www.centralnovascotia.com

Key Informant Interviews:

- Michelle Byers, Cumberland County
- Mechele Scott, ACOA
- Nick Fry, Tourism Nova Scotia
- Michael Fuller, Parrsboro Creative
- Darlene MacDonald, Tourism Nova Scotia
- Devon Fry, CNTA

- Allen Walter, Joggins Fossil Institute

Market Profile information sources included:

- Nova Scotia Tourism Vision
- Tourism Nova Scotia Market Segmentation Presentation, November 24-2015
- Key information on the visitor anticipated to visit Atlantic Canada to 2017
- Nova Scotia’s Visitor Exit Survey (VES) 2010
- Bay of Fundy & Annapolis Valley Region VES, 2010
 - Nova Scotia Tourism Statistics (<https://tourismns.ca/tourism-industry-research-services>)
 - Information from key tourism operators on Parrsboro Shore. While these sources provide a wealth of visitor information, they are “proxies” for actual information on visitors to the Parrsboro Shore.

Appendix 6:

Atlantic Canada Target Audience Profiles

The Atlantic Canada Tourism Partnership (ACTP), of which Nova Scotia is a partner, conducts active marketing and sales programs in New England and the Mid-Atlantic US States and in select overseas markets to promote measurable visitation to the province. ACTP focuses its marketing efforts in New England and Mid-Atlantic – the northeastern US-- on three key audiences which are described in EQ terms, as:

- *Exurban Explorers* (affluent, middle-aged to older, primarily couples)
- *Outdoor Experiencers* (younger to middle-aged couples, some with kids)
- *Young Families* (affluent and travel with children still at home).

A profile of these groups including their values, motivations and habits of these target audiences is outlined in Table 2, below.

Table 2

Atlantic Canada Markets	Profile - Snapshot	What They Value	Desired Experiences
<i>Outdoor Experiencers</i>			
	5.3 million households in NE-USA.	Willing to spend for their money's worth	Outdoors: coasts & parks. Interested in museums/exhibits/historic sites.

	Comfortable financially = HH income \$93k. Rationale and understanding, middle-aged and many empty nesters: couples	Value learning opportunities with others. Travel = personal development	Local lifestyles & flavours. Food and wine festivals
	Laid back lifestyle at home	Value strong connections and close knit communities	Independent, unstructured touring. Enjoy "to plan their own adventures"
	Heavy users of newspapers & TV.	Relaxation & rejuvenation	Seeking undiscovered, authentic products & services
	To plan: Use destination websites, some social media		
Young Families			
	1.9 million households in NE-USA	Enjoy meaningful, everyday activities	Low key family activities and often like to test their limits with unique and spontaneous
	Younger to middle-aged families with children at home. Affluent = HH income of \$106k+	Care about the environment and ethical practices	
	Confident. Leaders with a preference for formal over casual	Physically active and health conscious	
	To plan: Heavy online users at home and work. Daily newspaper readers		
Exurban Explorers			
	5.9 million households in NE-USA.	Appreciate their east coast roots & traditions	Seek unconventional & unique experiences & new sensations
	Affluent (HH income of \$105k+) middle-aged to older adults. couples & older families	Value control, place logit over emotions	Some low-key activities (boating, golf)
	Travel as couples or with older family members		
	Have the money to explore through travel		
	Heavy users: TV, newspapers, magazines		

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Nova Scotia: Non-Resident Visitor Activities

Nova Scotia visitors travel primarily as couples, by rubber tire and for the majority, the trip purpose is to visit friends and relatives (VFR); only one-third describe their primary reason to come as pleasure. The majority of non-resident visitors to NS come from the Maritimes (dominantly NB) followed by Ontario. A significant majority are repeat visitors to the province who express interest in coastal, cultural outdoor and urban experiences. Table 3 below outlines the most relevant interests and activities of those who visit the Bay of Fundy/ Annapolis Valley compared to all non-resident visitors to the province.

Table 3: Non-Resident Activities-Bay of Fundy Annapolis Valley

Activities	Nova Scotia Visitors	B of F/ A Valley Visitors
Coastal Sightseeing	17%	23%
Hiking (Coastal or Woods)	16%	22%
Visit Craft Shops/Studio	29%	36%
Museums/ Historic Sites	25%	33%
Nature/Fossil/Geology Site	13%	20%
Art Galleries/ Studio	10%	12%
Live Music Performance	13%	14%

Source: 2010 Nova Scotia Exit Survey

