



Central Nova Scotia
Strategic Tourism Expansion Program
2025 – 2027 Tourism Strategy
 February 18, 2024

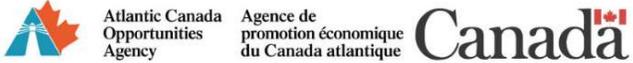




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APPRECIATION

The successful outcomes of this project resulted from the active participation of several organizations and individuals.

We thank Millbrook First Nation and the Colchester County, Truro, and Stewiacke municipalities for their participation, including financial contributions. We also thank Alison Grant (Town of Truro) and Jennifer Mantin (Colchester County) for their leadership and efforts toward effective collaboration, organization, and participation from all involved.

We want to acknowledge and thank the STEP Working Committee (Appendix 1) for their commitment to overseeing the process and providing valuable input and feedback at many points through the strategy development process. We also acknowledge the leadership of Miriah Kearney, who served as Working Committee Chair.

We also acknowledge the many business owners, community leaders, volunteers, and residents who live and work throughout Colchester County and who participated in the strategy development process. Their collaborative efforts and willingness to provide input and observations contributed significantly to helping inform the strategy recommendations. We also thank Tourism Nova Scotia for their involvement and counsel.

Finally, we acknowledge the support and financial contributions made by the Government of Canada through its partners at the Atlantic Canada Opportunities Agency (ACOA, Tourism Atlantic). Their interest and commitment to enhancing Canada's tourism offerings, including Truro and Colchester County, is appreciated.

As the facilitator of the STEP process, we are pleased with the outcomes of this collaborative effort to enhance the visitor economy throughout Colchester County. We are confident this region will soon reach its full potential as a thriving tourism destination through positive and proactive partnerships and actions.

BRAIN TRUST

www.braintrustmarketing.com

ACKNOWLEDGING THE ROOTS OF OUR COMMUNITIES

This region of Nova Scotia is in Mi'kma'ki, the ancestral and unceded territory of the Mi'kmaw People, and is subject to the Treaties of Peace and Friendship.

We will strive to elevate Indigenous interests and perspectives in our storytelling and tourism experiences, paving the way for an inclusive and authentic portrayal of cultural heritage and natural wonders.



Photo: Millbrook First Nation

EXECUTIVE SUMMARY

The Central Nova Scotia (Truro, Colchester County, Millbrook and Stewiacke) Strategic Tourism Expansion Plan (“STEP”) was developed as global tourism rebounded after several challenging years. Additionally, the recent enactment of provincial legislation has permitted the collection of a tourism marketing levy at the municipal level, providing sustainable funds to support new regional tourism development, sales, and promotion.

Partners, tourism sector operators, and citizens within Central Nova Scotia have rallied behind a collaborative and community-based regional tourism development process. The goal is to guide the formation of a tourism organization or similar structure to develop key actions over the next three years to impact the region’s visitor economy.

The planning context considered several factors but was grounded in the understanding that a great place to live is a great place to visit. Asset-based community development starts with what exists vs. what might be needed. It takes steps to enhance the competitiveness and appeal of our communities to attract visitors from away. This approach is tourism development through a citizen and operator lens.

Six findings and observations were revealed through extensive public consultation and validated by a community and tourism sector-populated working group. These included:

1. The region is starting from a position of strength with a long list of built and natural tourism assets, infrastructure and services.
2. Tourism development through a regenerative lens was embraced by stakeholders – Tourism as a Force for Good.
3. Existing tourism assets can facilitate more visitor-centric experiences.
4. A tourism marketing levy will support a sustainable tourism development plan.
5. The UNESCO Cliffs of Fundy Global Geopark represent unrealized potential as a tourism demand generator.
6. The lack of a tourism entity to facilitate the tourism development process is a significant shortcoming.

The discovery process also revealed the region’s unique themes, narratives, and visitor touchpoints, including:

- Vibrant Towns, Villages, First Nation
- Coastal and Rural Landscapes
- Four-season Outdoor Recreation
- Meetings, Conferences, Festivals & Events



The region's unique themes, narratives, and touchpoints:

- Differentiate the Truro/Colchester/Millbrook/Stewiacke region from other communities.
- Help attract and extend the length of stay of visitors.
- Include developed and underdeveloped tourism assets.
- Support the creation of enhanced and new visitor experiences.

Visitor touchpoints are defined as built or natural tourism products and experiences. They are the sites, services, landscapes, and attractions that appeal to visitors and locals alike.

Combining the findings, observations, unique themes, narratives, and visitor touchpoints led to identifying the following twelve key recommendations supported by a series of actions, responsibilities and timelines.

KEY RECOMMENDATIONS

1. Operationalize the STEP Implementation Leadership Model, which aims to balance accountability, local representation, and effective implementation of the tourism strategy.
2. Accommodation levy funds fuel region-wide tourism destination development and management, driven by the recommendations and actions outlined in the Three-Year Tourism Strategy.
3. Secure broad-based awareness, endorsement, and engagement for the tourism strategy by initiating an inclusive and comprehensive Communications Plan to mobilize current, new, and non-traditional community members and business stakeholders.
4. Prioritize tourism development initiatives that present the most significant opportunities to secure year-round overnight travel to the region within the next twelve months.
5. Fully leverage the potential benefits of the UNESCO-designated Cliffs of Fundy Global Geopark; facilitate a collaborative discovery/planning process with the park's leadership and representatives from the Tourism Society.
6. Leverage the power of the three identified leisure market destination themes (Vibrant Towns Villages and First Nations, Coastal and Rural Landscapes, and Four Seasons Outdoor Recreation) and the associated visitor touchpoints to foster the creation of enhanced or new year-round legendary visitor experiences that emphasize connections with local people.
7. Leverage the region's central and accessible location within the province and its ample accommodation options and meeting venues to grow overnight visitation from the business events market, emphasizing securing new business in the off-season (November – May).

8. Build on the region's recent and successful activity in the special events market; continue to support promotion and sales activities to secure more major events at the times of the year when business is needed.
9. The region is fortunate to have year-round tourism infrastructure and services to welcome and accommodate various visitors; for this reason, explore the potential to expand the Truro Winter Long John Festival from a weekend to a month-long event in February.
10. Conduct a digital footprint analysis to take proactive steps to maximize the community's online presence (this can be funded through the current STEP budget).
11. Ground tourism development in regenerative tourism practices.
12. Identify and address service and infrastructure gaps in collaboration with others, precisely those detrimental to the visitor journey.

The Working Committee, Town/County/First Nations staff, community leaders/organizations, citizens, and tourism sector stakeholders have validated and helped prioritize the recommendations and actions, which are believed to be achievable over the next three years. To do so will require dedicated staff resources, engagement/buy-in, determination, commitment, and focus from a broad base of stakeholders in and outside the tourism sector in the region. This includes citizens, business operators, community groups, and governments.

2025 - 2027 REGIONAL TOURISM STRATEGY

Early in 2023, after considerable discussions, Colchester County, the Town of Truro, the Town of Stewiacke, Millbrook First Nation, the tourism sector and community-based business leaders identified the need to create an overarching tourism strategy for the region. That need came because of changes to provincial legislation, which allowed for the collection of a tourism marketing levy.

Understanding that sustainable funds were available to support tourism development, led municipal staff to seek partner funding through Tourism Atlantic to implement their tourism strategy development process. In November 2023, the partners issued a Request for Proposal to identify a consulting firm to facilitate the creation of Central Nova Scotia’s Tourism Strategic Tourism Expansion Program (STEP). The deliverable, as articulated in the Request for Proposal, was as follows:

“Collaborate on the development, implementation, and monitoring of regional tourism marketing and development strategies that consider regional assets, local accommodation providers, sector strengths, regional opportunities and challenges, and consider provincial and regional priorities. The regional strategic plan will help guide the formation of a tourism organization or similar structure and its governance model and develop key actions over the next 3 years.”

Four fundamental imperatives, determined against the changing dynamics of tourism destination development at a regional level, guided the process:

DESTINATION ALIGNMENT – Today, more than ever, industry, community and government alignment must drive destination appeal, visitation, and revenues.

CONNECTION TO COMMUNITIES – Communities belong to the people who call them home. Community-based tourism integrates residents into all aspects of the tourism experience, emphasizing cultural preservation, environmental conservation, and economic empowerment.

CONNECTION TO THE VISITOR – Being visitor-centric ensures guests feel welcome and can access information and services that make their visit a positive experience.

ASSET-BASED COMMUNITY DEVELOPMENT – Focusing on opportunity leveraging, starting with what we have vs. what we need and identifying what enhances competitiveness and appeals to visitors from away.

PLANNING CONTEXT

The Central Nova Scotia STEP is being developed at a time when global tourism has rebounded after several challenging years.

GLOBAL TOURISM - INTERNATIONAL TRAVEL

According to UN Tourism, global tourism has fully recovered to pre-pandemic levels, with 1.4 billion international tourist arrivals recorded in 2024. This marks an 11% increase over the 1.3 billion arrivals in 2023, reaching figures last seen in 2019 before the Covid-19 pandemic disrupted global travel.

Looking ahead to 2025, UN Tourism predicts a 3 - 5% increase in international tourist arrivals, driven by the ongoing recovery in Asia, lower inflation, and stable geopolitical conditions. Challenges such as high transportation and accommodation costs, volatile oil prices, and workforce shortages remain significant hurdles for the sector.

Appendix II includes an overview of the tourism sector's performance at the international and national levels. This data suggests that tourism visitation and revenue have rebounded, exceeding 2019 benchmarks in almost every destination. However, some global destinations, including Canada and the US, have not reached 2019 levels in terms of visitation.

PLANNING AND DEVELOPING THE STEP: PROVINCIAL AND REGIONAL TRAVEL PERFORMANCE LEVELS

The Nova Scotia provincial and regional visitor and accommodation performance levels below provide specific data and context for planning and developing the STEP.

VISITORS¹

2019 Comparison: visitation remained below 2019 levels in 2024, down by 13% (235,000 fewer visitors).

- 1 million visitors arrived by road, down 6% and down 20% compared with 2019.
- 615,000 visitors arrived by air, an increase of 5% and up 2% compared with 2019.

2023 Comparison: January through September, 2024 with the same period in 2023:

Tourism Nova Scotia (TNS) reported just over 1.6 million visitors visited the province, down 2% (36,000 fewer visitors).

- **From Atlantic Canada:** a slower recovery in visitation down by 3%, with 21,000 fewer visitors and below 2019 levels, down 25%, or 214,000 fewer visitors.

¹ Tourism Nova Scotia. <https://tourismns.ca/accommodation-statistics>

- **From Ontario:** following strong growth in 2023, visitation from Ontario softened somewhat, with 489,000 visitors from Ontario, a decrease of 6% (31,000 fewer visitors) and an increase of 1% (6,000 more visitors) compared with the same period in 2019. Ontario remains the most crucial source of visitors, accounting for 30% of all visitors to Nova Scotia.
- **From Quebec:** has declined with 87,000 visitors, a 4% decrease (or 4,000 fewer visitors), and down 9% or 8,000 fewer visitors compared with the same period in 2019.
- **From Western Canada:** a 4% increase in visitors (6,000 more visitors) and a 17% increase, 26,000 more visitors, compared with 2019.
- **From the United States:** strong growth in visitation with 152,000 visitors, an increase of 12%, or 17,000 more visitors but well below 2019 levels, down 25%, or 49,000 fewer visitors.
- **From Overseas Markets:** 73,000 visitors, down 4%, 3,000 fewer visitors, but above 2019 levels, up 7%, or 5,000 more visitors.

ACCOMMODATIONS²

Comparison January through September, 2024 with the same period in 2023

REGIONAL

Nova Scotia accommodation operators reported 2.4 million room nights sold, a 1% increase, 17,000 more:

- Four regions³ saw growth in room nights sold:
 - South Shore, up 2% (4,000 more room nights sold)
 - Halifax Metro, up 3% (35,000 more room nights sold)
 - Cape Breton, up 2% (9,000 more room nights sold)
 - Yarmouth and Acadian Shores, up 4% (2,000 more room nights sold)
- Two regions³ experienced declines in room nights sold:
 - Northumberland/Eastern Shore, down 2% (400 fewer room nights sold).
The Northumberland Shore region (Tatamagouche and area) saw a minimal change in room sales, with 500 fewer room nights sold (down less than 1%).
 - Bay of Fundy & Annapolis Valley, down 10% (32,000 fewer nights sold).
Note: This region has seen a decline in available supply in 2024, contributing to the decline in room nights sold.

Sharing Economy Platforms: According to AirDNA data, 494,000 room nights were booked through sharing economy platforms (AirBNB, VRBO, etc.), an increase of 7%.

Average Room Rate: According to CBRE Hotels National Market Report, the average room rate was on par at \$196.

- The average room rate in the Halifax Regional Municipality was \$209 (down 1%).

² Ibid.

³ Colchester County falls within two regions. Truro and area are in the Bay of Fundy, and Annapolis Valley, Tatamagouche and the area is part of the Northumberland Shore region.

- For the same period, the average room rate of \$162 in the rest of Nova Scotia was up 6%.

CENTRAL NOVA SCOTIA⁴

- Accommodation operators reported decreased occupancy rates every month, as indicated in the chart below.
- There were more units available in 2024, +1,356, or .6% more units (assuming the same units were available in July 2023* as in July 2024).
- There were 6,120, or 4.9% fewer units sold (assuming the same units were sold in July 2023* as in July 2024).
- 2024 occupancy rates were negatively impacted based on increased units available in 2024 vs 2023. In addition, the Indigenous Games in August 2023 contributed to the 3.9% occupancy decrease in 2024.

Month	Occupancy 2024	Occupancy Chg. vs 2023	Total Units 2024	Total Units 2023	Units Chg. vs 2023	Properties 2024
Jan	38.7	-3.3%	20,107	20,082	.1%	18
Feb	46.2	-6%	18,988	18,160	4.5%	20
Mar	49.6	-8.7%	20,083	20,087	-.01%	20
Apr	51.8	-5.2%	19,701	19,730	-.1	21
May	43.1	-4%	28,795	27,745	3.8%	26
Jun	49.5	-5.6%	28,673	28,381	1%	28
Jul	68.9	NA*	29,609	NA*	NA*	28
Aug	69.9	-1.7%	26,868	27,965	-3.9%	27
Sep	68.3	-1%	22,746	22,455	1.3%	26

* Reported units sold by accommodators were insufficient in July 2023 for reporting purposes.

⁴ Ibid.

FUNDING THE STEP - TOURISM MARKETING LEVY

In November 2022, the Province of Nova Scotia passed new legislation through the Municipal Government Act (Bill No. 24) allowing municipalities to introduce a tourism marketing levy.

In April 2024, the Town of Truro, the Town of Stewiacke, the County of Colchester, and Millbrook First Nation (“Colchester County”) implemented a tourism marketing levy. The Municipality of Colchester and the Town of Truro manage the levy for the four partnering municipalities. An MOU was signed by the partners in 2023, outlining the intent to develop the STEP and pool regional marketing levy funds to execute the STEP recommendations.

Using a combination of 2022 and 2023 Tourism Nova Scotia accommodation occupancy data, which reports on an average of 23 properties, the tourism marketing levy in Colchester County is estimated to generate approximately \$780,000 annually (160,107 nights sold at a \$162 Average Daily Rate (ADR) and a 3% levy). This does not include sharing economy properties (SEPs).

Tourism Nova Scotia does not include all SEPs (Airbnb, VRBO, etc.) in their overall occupancy reporting. Therefore, the levy revenue will be higher based on the number of SEPs in Colchester County (131). Tourism Nova Scotia did provide data to calculate an average daily rate of \$234.68 for properties in Northumberland Shores and the Bay of Fundy regions; that rate is 44.8% higher than the average daily rate used in the levy calculation above.

PLANNING AND DISCOVERY PROCESS

The project team engaged with local stakeholders, tourism operators, and residents through one-on-one key informant interviews, small group consultations, and open public discovery workshops and planning sessions. Invitations for all sessions were emailed and communicated on social media and municipal websites. Sessions were hosted in Truro, Stewiacke, Millbrook, Tatamagouche and Masstown. The dialogue at all points of contact allowed for rich feedback, input, and validation throughout the planning process. Information gathered through each phase of the research and consultation process informed and inspired the development of the STEP.



As an initial step in the planning process, a STEP Working Group comprised of volunteers representing businesses, municipalities, provincial and federal governments, community groups, and citizens from all parts of the region was formed. Each group member agreed to a terms of reference that supported the overarching objectives and goals of the strategy development process. Members agreed to provide perspective and understanding of the tourism development landscape and identify challenges and opportunities through a citizen, operator, and organizational lens. More specifically, the Working Group provided:



- A regional lens, fostering the best for all.
- A supportive voice communicating the goals and steps of the process, encouraging community engagement.
- Recommendations and implementation actions prioritization.
- Advice on a sustainable governance/implementation leadership model.

Twenty-plus one-on-one and face-to-face interviews were conducted with individuals across various sectors, including tourism operators, elected officials, community leaders, and Tourism Nova Scotia and ACOA representatives.

Public consultation sessions were also scheduled throughout the planning process. A broad base of community members participated, from project launch sessions to visioning discovery sessions to findings and implications sessions. Sessions were held throughout the region and scheduled in the morning, afternoon and evening to provide ample opportunities for broad-based participation.

At the April project launch sessions, participants articulated their expectations for the project. These included:

- Generate action and results, not another report.
- Turn Truro into a destination vs. passing through point.
- Take actions to be more accessible/inclusive/welcoming as the region grows.
- Ensure Mi'kmaq voices and culture are a focus.
- Implement consistent regional messaging.
- Grow the economy and community with positive spinoffs.
- Understand and seize opportunities from leisure, business events, and tourism.
- Understand how the accommodation levy will be spent.



PLANNING PROCESS TIMELINE

1. **START-UP AND REGIONAL RESEARCH**

- Proponent Start-Up Meeting – January 17, 2024
- Asset Inventory and Assessment - Knowing what we have before knowing what we need and identifying potential development opportunities

2. **PROJECT START-UP:**

Working Group Session, Site Visit – Feb 6-9

- Lead partner/proponent meetings
- Tour key sites and attractions
- STEP orientation meeting with the working group

3. **CONSULTATION:**

Public Launch Sessions, Interviews, Site Visit – April 16-19 with Sessions in Truro (2), Masstown, Economy, Stewiacke, and Tatamagouche

- Key informant interviews and site visits

4. **VISION & DISCOVERY SESSIONS:**

Interviews, Site Visit – June 4-6

- Sessions at Tatamagouche Brewery, Wicked Hops (Alton), Legends Gaming Centre (Millbrook)
- Discuss/affirm regional vision and unique differentiators/narratives
- Identify and prioritize experience development opportunities



5. **LEADERSHIP MODEL INTERVIEWS AND DRAFT RECOMMENDATIONS**

- Virtual interviews: lead partners, municipal CAOs, community leaders, ACOA

6. **FINDINGS/IMPLICATION SESSIONS, LEAD PARTNERS MEETING**

(September 10-12)

- Two sessions at the Truro Public Library
- Lead Partner's Leadership Model Presentation, Discussion and Validation

FINDINGS AND OBSERVATIONS

The planning and discovery phase of the STEP revealed core findings and observations, which, once validated, led to strategic recommendations and actions. The Working Committee and business and community stakeholders validated the findings and observations and their high-level implications in sessions held in September 2024.



THE REGION IS STARTING FROM A POSITION OF STRENGTH

The region's strength is built on a foundation of collaboration and partnership. Tourism leaders have successfully marketed the destination, creating collaborative efforts to grow tourism's economic benefits. However, the pandemic presented challenges for operators playing lead roles in rallying the community behind various marketing endeavours, including an impactful tourism website, visitor centre, and tourism guide.

Fortunately, the spirit of collaboration resurfaced, and industry, governments, and community/business organizations once again collaborated to initiate the STEP in partnership with Tourism Atlantic. This included Truro, Colchester County, Stewiacke, Millbrook and Tatamagouche municipal, community and tourism leaders. It also involved senior management from the Truro Colchester Partnership for Economic Prosperity, the Truro & Colchester Chamber of Commerce, the Downtown Truro Partnership, and the Rath Eastlink Community Centre.

In addition, the region has an extensive list of inherent strengths, including:

- **Visitor sites, attractions, and events**, including UNESCO-designated Cliffs of Fundy, Global Geopark and the Bay of Fundy, the Millbrook First Nations Culture Centre, Victoria Park and vibrant main streets in Downtown Truro and Tatamagouche.
- **Year-round visitor infrastructure and services** (accommodations, F&B, transportation, performance/meeting/event venues etc.).

Many destinations in Canada, and most in Nova Scotia, have a fair-weather (April to October) and winter (November to March) tourism season. Having tourism services and infrastructure supported by visitor experiences in the winter months is a competitive advantage.

Celes Davar, from Earth Rhythms, an award-winning Nova Scotia experiential tourism company, observes there are two tourism seasons:–

1. **The Visitor Season**, the months traditionally focused on tourism, and
2. **The Season of Community**, when community-centric activities that cater to locals, take place.

Devar suggests that leveraging the season of community indoor activities vs only outdoor activities that are subject to unpredictable winter weather will attract visitors in the winter.

There is an opportunity to unite locals and visitors around food, music, storytelling, and learning from community creators and makers. An enhanced month-long February event (Long John Festival) that builds on the season of community concept could increase winter overnight visitation.



- **Meeting/conference, festival, and event venues** capable of attracting and facilitating year-round business events, sports tournaments, consumer shows and concerts.

The meetings and events industry in Canada is projected to flourish in 2025, according to American Express Global Business Travel⁵. Internal meetings are expected to be the most frequent meeting type in 2025. Professionals predict that half will be held at a hotel, 34% will be in a different city, and 35% will include social activities.

Recent visitor events held in Truro and Colchester County have made a significant contribution to the economy. For example, the 2024 Nova Scotia Stampede attracted thousands of out-of-town visitors and generated more than \$4 million in economic activity across the province. A recent [economic impact assessment](#) by Sport Tourism Canada⁶ shows the total net economic activity generated by the stampede, which was held in Truro and Bible Hill between Sept. 26 and Sept. 29, 2024, was \$2.2 million, with economic benefits extending beyond the area. The event benefited the province’s economy and supported more than \$1.1 million in local wages and salaries.

⁵ Corporate Meetings Network. Nov. 1, 2024. <https://corporatemeetingsnetwork.ca/2024/11/01/meetings-and-events-budgets-to-rise-in-2025/>

⁶ Sport Tourism Canada. Economic Impact Assessment Final Report – Nova Scotia Stampede. Oct 23, 2024. [efaidnbmnnnibpcajpcglclefindmkaj/https://www.novascotiastampede.com/_files/ugd/22229a_3da93ee034ae4f20970de973bcf9538b.pdf](https://www.novascotiastampede.com/_files/ugd/22229a_3da93ee034ae4f20970de973bcf9538b.pdf)

Excellent access to visitor markets (international airport, major highways, bus/rail service) and a high-demand province.

Nova Scotia has been named one of Travel + Leisure magazine’s 50 Best Places to Travel to in 2025⁷ under the “For Moments on the Water” category. The listing highlights the province’s increasingly accessible air travel, appealing accommodations, iconic coastal activities, and attractions.

According to Tourism Nova Scotia, “the province is seeing growth in the number of visitors arriving by air. In 2024, the province welcomed new direct flight routes and routes returning for the first time since the pandemic, making it easier for people to get here from key markets in the United States and Europe. WestJet has also announced a returning route between Paris and Edelweiss Air has announced a new route from Zurich in 2025.”

A GREAT PLACE TO LIVE IS A GREAT PLACE TO VISIT

The asset-based community development process introduced at the outset of the planning process resonated throughout the consultation process. The idea was that industry, community and government collaboration drives regional destination development, brand, visitation, and revenues, leading to sustainable prosperity for all. Helping locals learn about and celebrate existing tourism assets rather than focusing on what was missing leads to successful community-focused tourism development. It was a reminder that the things that locals take for granted, visitors appreciate. This was shown during the visioning sessions, which were held in early June in three unique venues (Wicked Hops, the Millbrook Culture Centre, and the Tatamagouche Brewery).



⁷ Travel + Leisure Editors. The 50 Best Places to Travel in 2025. November 2024. <https://www.travelandleisure.com/best-places-to-go-2025-8739580#toc-for-moments-on-the-water>

Participants were invited to gather and meet the owner-operators in the place where they welcome guests. Each shared their business story in their *Truro Colchester Moment*. The moments “brought local to life,” fostering a high degree of pride, enthusiasm, creativity, and discovery when participants planned various two-day overnight visitor itineraries in small group settings. The itineraries lead to future product development and marketing opportunities.

REGENERATIVE TOURISM – A FORCE FOR GOOD

The idea of guiding and supporting tourism development with an equal focus on economics and the well-being of people and places to measure success resonated. While new to some, the notion of putting the planet and people first through responsible and “regenerative” tourism development was soundly endorsed. Most everyone recognizes that a thriving, regenerative tourism ecosystem produces net benefits for the community and businesses and agrees with Destination Canada’s view that tourism is a community-builder, job generator, and potential path to reconciliation.

Regenerative tourism development builds people's capability to engage in a continuous and healthy relationship with the place where they live. There is constant learning and feedback so that all aspects of the system (natural, cultural, and economic) are an integral part of life in this place, which is a co-evolution.

“Regenerative practices mean balancing economic prosperity with environmental stewardship and social inclusivity so that the sector thrives and contributes positively to Canada’s broader wealth and wellbeing. By promoting regenerative practices, we’ll maintain visitor trust, protect local communities, and preserve the natural and cultural treasures that define tourism in our country.”

Destination Canada. Tourism 2030, A World of Opportunity. May 2024

Regenerative Tourism in Practice ⁸

1. See the whole picture.
2. Use sustainability standards (SDG).
3. Collaborate in destination management.
4. Choose quality over quantity.
5. Demand fair income distribution.
6. Reduce tourism’s burden.
7. Redefine economic success.
8. Mitigate climate impacts.
9. Reduce disposable resources.
10. Contain tourism’s land use.
11. Diversify source markets – local.
12. Protect the sense of place.
13. Operate businesses responsibly.

⁸ The Future of Tourism, 13 Guiding Principles. <https://www.futureoftourism.org/join>

LEGENDARY EXPERIENCES

The idea of preserving and celebrating our heritage, local cultures and traditions, natural surroundings, and rural and coastal landscapes through connections with local people resonated throughout consultations.

Legendary experiences do several things, including:

- Enhance local economies using local people, products and services
- Are frictionless, minimize the carbon footprint on the landscape
- Are inclusive, taking into consideration the visitor's needs
- Contribute to restoring ecosystems and community infrastructure



“Our communities are rich with storytellers, puppeteers, chefs, artists, musicians, inventors, artisans, culinary experts, and craftspeople, all of whom have a deep wisdom and knowledge about “that which is local. Experiential Tourism development is designed to find ways to connect visitors to these local folks and their stories and traditions by building relationships with them, crafting new income-generating experiences, and making these experiences commercially accessible.”⁹

Celes Davar, Earth Rhythms

Utilizing the successful train-the-trainer Awaken Workshop, where municipal tourism staff came together with their Nova Scotia colleagues to learn how to recruit, engage, and educate locals in experiential tourism techniques, could lead to new visitor-centric experiences in the region. Implementing a program like this locally aims to inspire and challenge business owners and community partners to think about new ways to create memorable visitor tourism experiences.



⁹ Celes Devar. Earth Rhythms. Crafting Legendary Visitor Experiences, Experience Partners' Guidebook. 2024

TOURISM MARKETING LEVY

The idea that the marketing levy supports the delivery of STEP recommendations fueling county-wide tourism destination development and management resonated. In the launch sessions held in April, participants asked questions about introducing the levy. Some expressed concern that funds would only be used to support the existing high tourism traffic areas or only to attract and support events that would take place in Truro. Through constructive dialogue and discussions, questions were answered, and clarity was provided, leading to overwhelming support for introducing the tourism marketing levy.

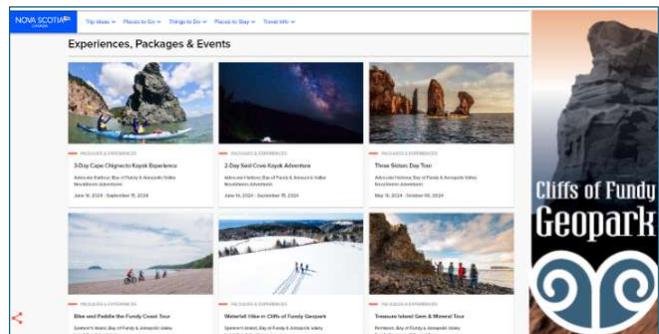
UNESCO CLIFFS OF FUNDY GLOBAL GEOPARK

Having the UNESCO-designated Global Geopark in your backyard is undervalued; this asset represents an unprecedented opportunity for the region.

The UNESCO designation is an internationally significant differentiator.

UNESCO Global Geoparks are single, unified geographical areas where sites and landscapes of international geological significance are managed with a holistic concept of protection, education and sustainable development. UNESCO Global Geoparks empower local communities and allow them to develop cohesive partnerships to promote the area's significant geological processes, features, periods of time, historical themes linked to geology, or outstanding geological beauty. At present, there are 213 UNESCO Global Geoparks in 48 countries.¹⁰

Tourism Nova Scotia packages and promotes tourism experiences on its website, which is visited by potential visitors worldwide.



Research indicates that certain visitors seek out and visit UNESCO sites. Heritage sites attract *High-Value Guests**, which align with the tourism assets present in Truro Colchester

*Destination Canada's customer segmentation profiles were introduced to stakeholders throughout the planning and discovery process.

¹⁰ UNESCO. International Geoscience and Geoparks Programme. <https://www.unesco.org/en/igpp/geoparks/about>

Heritage tourism is a growing segment of the modern tourism industry, and several studies have been undertaken to identify the individuals who participate in this type of tourism. These have indicated that heritage tourists are generally middle-class, middle-aged, and well-educated.¹¹

The Geopark lacks sufficient operational funds to help the Geo Park Board meet UNESCO guidelines and support new infrastructure and visitor experience enhancements.

STEP IMPLEMENTATION LEADERSHIP MODEL

The region lacks a sustainable leadership entity to facilitate the implementation of the STEP recommendations. While the municipalities have facilitated the tourism strategy development process, the need for a more permanent tourism development facilitator has been identified. Through the consultation process, consensus was reached as to the parameters, imperatives, purpose and role of the leadership model:

- STEP identifies future tourism destination management strategies
- Levy resources support the implementation of STEP strategies
- Responsibly stimulate four-season, regional, tourism destination management, marketing, and sales focusing on:
 - Leisure travel – tourists
 - Meetings and conferences – planners
 - Signature events – sports/entertainment/other

TOURISM DESTINATION MARKETING OR MANAGEMENT ORGANIZATION (DMO)

is a traditional leadership model utilized worldwide and is a non-profit organization that promotes a location as a travel destination. DMOs are also called tourism authorities, tourist boards, or convention and visitor bureaus. The mandate of a traditional DMO is to:

1. Attract visitors to a destination.
2. Stimulate economic growth in the destination.
3. Advocate for infrastructure development and environmental preservation.

Discover Halifax is a DMO. It is a non-profit organization that aims to maximize the economic and social benefits of the tourism industry for the people who live, visit, and invest in our region. More specifically, they:

- help drive and prioritize the efforts and investments that will lead to sustainable economic growth from the region's tourism economy, accomplishing one crucial thing: it will enrich the lives of our citizens, and
- showcase the best of the region to the world and, alongside industry partners, seek to shape the future of tourism through good planning, investment, and design.

¹¹ Research Gate. Bailey Ashton Adie, University of Oulu. Who visits World Heritage? A comparative analysis of three cultural sites.

There are existing organizations in the region with expertise relevant to STEP implementation, for example:

- Effective governance, oversight, and accountability
- Business support, training and capacity building
- Event attraction and implementation
- Organizational management
- Investment attraction
- Social media marketing
- Community and business relations

In September, a leadership implementation planning meeting was held. The session aimed to explore options for a sustainable leadership model and reach a consensus on a way forward. In attendance were representatives from:

- Municipalities of Truro, Colchester County, Stewiacke, Millbrook First Nation
- Senior management from the Truro Colchester Partnership for Economic Prosperity, the Truro & Colchester Chamber of Commerce, Downtown Truro, and the Rath Eastlink Community Centre
- Tourism Atlantic (ACOA)

The group explored several questions to help focus discussion and discovery:

1. In your mind, what core values should be the foundation of the leadership model?
2. To be successful, what specific outcomes must the leadership model deliver in the first 12-18 months?
3. To what extent do the identified outcomes align with your organization's mandate? 100%, 75%, 50% or less

A proposed leadership model was presented, discussed and ultimately validated in principle.

PROPOSED LEADERSHIP MODEL

Regional Tourism Development Society

- Independent, Not-for-Profit Society.
- Acts promote regional tourism in Colchester County.
- Activities are guided by the STEP recommendations.
- Funded by regional marketing levy funds.
- Comprising municipal representatives, industry leaders, and community stakeholders.



Manager Tourism Development

- Direct staff resource to the Society.
- Supports the implementation of the strategic plan.
- Coordinates activities of the implementation partners, with approval from Society.



Implementation Partners

- Act to implementing specific components of the STEP recommendations under the Society's direction.
- Facilitation could take the form of Ad hoc contracts for one-off initiatives, or year-over-year roles.

MARKET SEGMENTATION/CUSTOMER PROFILES

In tourism destination management and development, we must understand the leisure customers or tourists we are attempting to engage and attract. Destination Canada's High-Value Guest profiles were introduced and embraced through the planning and discovery process to provide helpful, research-based direction.

High-Value Guests: leisure travellers who are naturally curious and actively seek cultural sites, attractions, and experiences. They are learners, appreciate slow travel, and seek opportunities to engage with locals. Additionally, they choose experience over price when making travel decisions.

The underlying goal of the STEP is to attract increased visitation from leisure market visitors who reside outside Nova Scotia. Visitors from away stay longer and spend more, and Nova Scotia is already on their bucket list of travel destinations.

In December 2024, Destination Canada introduced an evolution of its High-Value Guest travel market segmentation profiles as part of the newly developed Canadian Tourism Data Collective.¹² This newly developed customer segmentation program, defined as Highly Engaged Guests, is designed to help the tourism sector plan, develop, and market more effectively in the future.

¹² Destination Canada. <https://www.tourismdatacollective.ca/>

“With the highly engaged guests we are targeting, it’s not about the spend they bring, but the values they bring to their travel. Their willingness to go beyond the iconic locations, to see more of Canada, to engage with and respect the local community – these are the people we look for in the world to invite to our country, the ones that can bring the most net benefit to Canadians.”

Masha Walden, President, Destination Canada

The STEP should leverage the knowledge and insight from the new Highly Engaged Guest¹³ market segmentation program.

Preliminary use of the segmentation tool suggests that it can provide rich customer data based on the unique themes and narratives identified through the planning process. For example, Canadians from away are Nova Scotia’s number one market. Ontarians, for example, remain the most crucial source of visitors, accounting for 30% of all visitors to Nova Scotia. Profiling potential Canadian visitors using the regions tourism assets, themes, and destination characteristics against the segmentation tool data sets identified two primary target customer groups.

The following segmentation profiles represent a high-level sample overview of the two primary segments (outdoor explorers and culture seekers) for all of Colchester County. Further work utilizing the segmentation tool will identify a wealth of additional data. These are highly engaged guest segments that Destination Canada has identified as having both high responsible and economic values that benefit Canadian communities.

¹³ Destination Canada. Canadian Market Profiles. https://www.tourismdatacollective.ca/system/files/2024-11/EN_DC%20Segmentation%20Profile_CA.pdf



OUTDOOR EXPLORERS

This daring explorer craves the thrill of unknown landscapes and loves to overcome challenges. Adventure travel allows them to grow, learn new skills, and establish personal traditions. They often seek adrenaline through physical activities, engaging with locals, and ensuring a positive impact. They embrace both short getaways and longer holidays, relishing in nature-related experiences.

Destination type



- Adventurous
- Unexplored
- Fun
- Unique
- Authentic

Travel activities



- Nature Experiences
- Water-Based Sports
- Casual Sports
- Winter Sports

Core Travel Motivations



CULTURE SEEKERS

These sociable, free-spirited individuals seek unique, authentic experiences. They thrive on immersing themselves in new perspectives and local culture and making connections, which boosts their energy and confidence. They prefer vibrant city life, dynamic art scenes, and culturally rich destinations. They prioritize diversity, inclusion, and sustainability and are open to short and longer trips. Travel is an investment they make in themselves.

Destination type

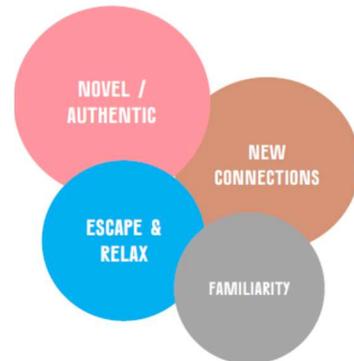
- Unique
- Authentic
- Open
- Accepting
- Friendly
- Sociable
- Relaxed



Travel activities

- Cultural Experiences / Attractions
- Local Cuisine
- Festivals & Events

Core Travel Motivations



UNIQUE COMMUNITY THEMES/NARRATIVES

Themes and Narratives. The planning and discovery phase led to the identification of four unique themes/narratives, which:

1. differentiate the Truro/Colchester/Millbrook/Stewiacke region from other communities,
2. help attract and extend the length of stay of visitors,
3. include developed and underdeveloped tourism assets, and
4. support the creation of enhanced and new visitor experiences.



Identified themes are overarching product and experience categories supported by any number of visitor touchpoints.

Visitor Touchpoints are defined as built or natural tourism products and experiences. They are the sites, services, landscapes, and attractions that appeal to visitors and locals alike. They can be fully developed, developed but underperforming or underdeveloped.

Developed: Fully leveraging the opportunities

Underperforming: Need tactics to enhance the experience, exposure, visitation, sales

Underdeveloped: Investment is needed to enhance the opportunity

Asking and answering four questions revealed ways to leverage the power of the unique themes/narratives:

1. What benefits are our high-value guests seeking?
2. How do we deliver unforgettable experiences related to the themes?
3. What can we offer that is uniquely ours to attract visitors?
4. How do we layer on engagement and emotion to exceed expectations?

Legendary Experiences can animate the themes through connections with local people; learn something by doing something with someone who lives here! Capacity building is required.

Itinerary development can mobilize stakeholders.



IDENTIFIED THEMES/NARRATIVES

VIBRANT TOWNS, VILLAGES, FIRST NATION



Visitor Touchpoints:

- Truro, Tatamagouche, Millbrook, Stewiacke, Economy, Bible Hill
- Mastodon Ridge, Coldstream Clear Distillery, Restaurants/Sea Food
- Local Retail, Arts & Heritage, Studios/Galleries,
- Community Spaces, Town Halls, Live Music
- Mi'kmaw Culture & Heritage Centre, Pow Wow, Alan Syliboy Art Studio
- Farmers Markets, Breweries, Cannabis Shops,
- Community Festivals and Events

COASTAL AND RURAL LANDSCAPES



Visitor Touchpoints:

- Cliffs of Fundy Global Geopark
- Agriculture, Farm Gates, County Fairs
- Harness Racing
- Masstown Market, Quilt Trail
- Shubenacadie Provincial Wildlife Park
- Fundy River Rafting
- Heritage Sites, Artisans, Mills, Farm Museum

FOUR-SEASON OUTDOOR RECREATION



Visitor Touchpoints:

- Victoria Park, Cobequid Trail
- Hiking, Cycling
- Paddling, Angling, Rafting
- Cross-County Skiing, Snowmobiling, Ice Skating, Snow Shoeing

MEETINGS, CONFERENCES, TRADE SHOWS, MAJOR EVENTS



Visitor Touchpoints:

- Four-Season Hotels, Conference Centres
- RECC, NS Exhibition Complex, Legends Gaming Centre (Millbrook)
- Incentive Travel Options, Unique Venues
- Pow Wow Grounds

RECOMMENDATIONS AND ACTION PLAN

The STEP recommendations and actions are based on findings and observations revealed through the discovery consultation sessions, key informant interviews, working group input, current/future market dynamics, and the realities of a redefined tourism landscape.

The Working Group, town/county/First Nations staff, community leaders/ organizations, citizens, and tourism sector stakeholders have validated and helped prioritize the recommendations and actions, which are believed to be achievable over the next three years. This will require dedicated staff resources, engagement/buy-in, determination, commitment, and focus from a broad base of stakeholders in and outside the tourism sector in the region. This includes citizens, business operators, community groups, and governments.

ACTION PLAN (FEBRUARY 18, 2024)

ROLE LEGEND	
TDS	Regional Tourism Development Society
MUN	Municipalities/First Nation (Includes Millbrook First Nation, Town of Truro, County of Colchester, Town of Stewiacke)
TM	Tourism Manager
LP	Lead Implementation Partners (Chamber of Commerce, Truro Colchester Partnership for Economic Prosperity, Central NS Civic Centre Society, Downtown Truro, and others)
TOP	Tourism Operators
RES	Residents
TNS	Tourism Nova Scotia
ACOA	Atlantic Canada Opportunities Agency/Tourism Atlantic

TIMING LEGEND	
IT	Immediate Term: June 2025
ST	Short Term: July to March 2026
MT	Mid-Term: April to December 2026
LT	Long Term: January to December 2027

Recommendation and Action	Role	Timing
<i>Operationalize the Strategic Tourism Expansion Plan Implementation Leadership Model, which aims to balance accountability, local representation, and effective implementation of the tourism strategy.</i>		
<ul style="list-style-type: none"> • Establish the Regional Tourism Development Society (not-for-profit) <ul style="list-style-type: none"> ▪ An interim Executive Committee made up of municipal partners is established to oversee the formation of the Tourism Society and execute initial board recruitment. ▪ The Executive Committee members will take the four municipal seats on the Tourism Society Board. ▪ The leadership model will include the following once approved by Councils and First Nations: 	MUN LP	IT
<ul style="list-style-type: none"> • The Society, as a Core Accountability Body, serves as the primary accountability group, comprising municipal representatives, industry leaders, and community stakeholders. Specifically, the Society would include 11 representatives: <ul style="list-style-type: none"> ○ Four municipal/First Nation units (one from each - Truro, Colchester, Millbrook and Stewiacke. ○ An application process would ensure diverse representation across Colchester, considering geographic balance and industry representation from multiple Colchester communities. ○ Varied perspectives within the industry to select: <ul style="list-style-type: none"> ▪ Three industry partners (representing one large hotel, one Airbnb/VRBO, and one small niche operator ▪ Four tourism-related attraction operators 	MUN LP	IT
<ul style="list-style-type: none"> • Accountability and Financial Oversight: a committee within the Society would manage accountability and financial oversight, distinct from the operational support of facilitating entities <ul style="list-style-type: none"> ○ Implementation Partners would be required to report back to this committee through annual presentations or regular updates, particularly when the Society is setting its yearly operations budget 	DS MUN LP	IT
<ul style="list-style-type: none"> • A STEP Tourism Manager: Recruited and hired by the Society and municipalities (or one designated Municipality), the Tourism Manager is required to support the implementation of the strategic plan and coordinate the activities of the facilitating partners <p>This role would also allow the Tourism Manager to undertake specific actions directly within the STEP plan or engage third-party vendors for initiatives as needed</p>	DS MUN	IT
<ul style="list-style-type: none"> • A Facilitation Role of Existing Entities, referred to as “Implementation Partners”: for example, the Truro & Colchester Chamber of Commerce, TCPEP, CNSCCS, and the Downtown Truro Partnership, and potentially others, could serve as collaborative partners. <ul style="list-style-type: none"> ○ While these four entities could be core implementation partners, the Society would remain open to involving additional organizations as 	DS LP TM	IT

Recommendation and Action	Role	Timing
<p>needed, given that certain groups currently receive funding from Truro and Colchester but not Stewiacke and Millbrook.</p> <ul style="list-style-type: none"> ○ Their role would focus on implementing specific components of the STEP recommendations under the Society’s direction rather than managing or overseeing the plan independently. This facilitation could take the form of Ad hoc contracts for one-off initiatives or year-over-year roles. 		
<p><i>Accommodation levy funds fuel region-wide tourism destination development and management, driven by the recommendations and actions outlined in the Three-Year Tourism Strategy.</i></p>		
<ul style="list-style-type: none"> • To streamline fund allocation, projects to be considered must align with the STEP recommendations and actions identified in this Plan. • As a guiding principle, and for the immediate term, funds will be allocated based on the immediate upside opportunity to generate tangible results. • Priority will be given to activities that impact these destination development, management, marketing and sales market segments, recognizing tactics like a Regional Future Bookings Calendar may not require significant levy dollars but is a critical action to impact mid to long-term bookings for the Business Events and Special Events, therefore, it will require human resources to make a positive impact and as such becomes a priority: <ol style="list-style-type: none"> 1. <u>Business Events</u> – sales and marketing activities that increase awareness and future off-season overnight bookings of the region’s accommodation, conference venues, and convention services 2. <u>Special Events</u> - sales activities to identify, attract and secure on-theme events during the off-season and that utilize event infrastructure located throughout the region 3. <u>Leisure Market</u> – with emphasis on attracting year-round out-of-province tourists, identify development activities to enhance the visitor journey, and where appropriate, marketing tactics to enhance awareness and short-term bookings 	MUN DS TM	IT
<ul style="list-style-type: none"> • In partnership, the Society, the municipal partners, and the lead partners will review <u>immediate-term</u> tactics and allocate levy resources by the market for specific development, sales, and marketing initiatives, for example: <ul style="list-style-type: none"> ➤ Business Events – 25% ➤ Special Events – 25% ➤ Leisure Market – 50% 	MUN DS TM	IT
<ul style="list-style-type: none"> • To manage levy collection, tracking and reporting, the municipal partners will continue implementing the original administration process; at the same time, to streamline the levy process and minimize the municipal resources used to administer levy collection, tracking, and reporting, the partners will investigate best practices from other destinations to determine if there are more efficient levy administration practices. • Specifically explore the process being used in Ontario where a not-for-profit tourism industry association (the Ontario Restaurant, Motel, Hotel Association) developed a process which is currently being implemented in 27 Ontario municipalities. 	MUN	IT

Recommendation and Action	Role	Timing
<i>Secure broad-based awareness, endorsement, and engagement for the tourism strategy by initiating an inclusive and comprehensive Communications Plan to mobilize current, new, and non-traditional community members and business stakeholders.</i>		
<ul style="list-style-type: none"> Hold a series of community strategy launch sessions Create a tourism strategy stakeholder information website Issue a quarterly strategy update bulletin Hold twice-yearly (Spring, late Fall) tourism awareness summits to update the community and business stakeholders on strategy plans and activities 	MUN DS TM	IT
<i>Prioritize tourism development initiatives that present the most significant opportunities to secure year-round overnight travel to the region within the next twelve months.</i>		
<p>Explore activities to stimulate business from the following market segments:</p> <ul style="list-style-type: none"> <u>From-away/out-of-province leisure customers</u> – develop and present compelling reasons to visit when these high-value guests are in the planning stage of their Nova Scotia holiday <ul style="list-style-type: none"> Work with TNS to promote <u>current</u> experience packages and visitor itineraries to encourage immediate bookings 	DS TM LP TNS	IT
<ul style="list-style-type: none"> <u>Business and Special Event customers</u> – given the longer lead time for booking, initiate proactive marketing and sales tactics now to secure future business from the Canadian, Atlantic Canada and Nova Scotia Meetings, Incentives, Conferences, Exhibitions and Special Events markets <ul style="list-style-type: none"> Working with the lead partners, identify the steps needed to initiate coordinated sales and marketing strategies, including venue/service asset inventory, unique selling proposition, market analysis, bid proposal templates, online booking tools, etc. 	TM LP TNS Dest Halifax	IT
<i>To fully leverage the potential benefits of the UNESCO-designated Cliffs of Fundy Global Geopark, facilitate a collaborative discovery/planning process with the Parks leadership and representatives from the Tourism Society.</i>		
<p>Build on the 2021 Cliffs of Fundy Interpretive Strategy and, as appropriate, proactively and collaboratively identify strategies to:</p> <ul style="list-style-type: none"> Come alongside the Geo Park leadership to help identify tactics to fully leverage the park's potential considering a refreshed recognition that the UNESCO designation and existing and enhanced year-round Bay of Fundy visitor experiences have the potential to raise the profile of the region and increase visitation to the region 	Cliffs of Fundy TDS TM TNS	ST
<ul style="list-style-type: none"> Collectively discuss a more sustainable funding model to help the Geo Park Board meet UNESCO guidelines and support new infrastructure and visitor experience enhancements <ul style="list-style-type: none"> Secure participation in discussions from the Municipality of Cumberland as well as fellow partners in the Geopark 	Fundy TDS TM	ST
<ul style="list-style-type: none"> Leverage the appeal of the current year-round visitor experiences by ensuring Tourism Nova Scotia has all purchasable Fundy experiences on its website 	TM TNS	IT

Recommendation and Action	Role	Timing
<p><i>Leverage the power of the three identified leisure market destination themes (Vibrant Towns Villages and First Nations, Coastal and Rural Landscapes, and Four Seasons Outdoor Recreation) and the associated visitor touchpoints to foster the creation of enhanced or new year-round legendary visitor experiences that emphasize connections with local people.</i></p>		
<ul style="list-style-type: none"> Take proactive steps to leverage the power of the themes by optimizing the existing theme-related purchasable, curated, visitor-friendly tourism experiences through enhanced partner promotion with TNS, County, Town and lead partner social channels 	TM LP TNS	ST MT
<ul style="list-style-type: none"> Build an image (photos, video) library of current experiences on offer for use in future marketing materials 	TM LP	IT
<ul style="list-style-type: none"> Recruit, train, and empower a network of theme-related experience providers (citizens) to develop new visitor-friendly experiences through the development of a <i>Call for Experience Providers</i> pilot program, which provides training and seed funding to create eligible experiences 	TM LP TNS	ST MT
<ul style="list-style-type: none"> Following the successful inaugural Awaken Workshop, which aimed to inspire and challenge business owners and community partners to think about new ways to create memorable visitor tourism experiences, continue facilitating these training sessions centred around the destination themes for those who respond to the <i>Call for Experience Providers</i> pilot program 	TM MUN LP	ST MT
<ul style="list-style-type: none"> Partner with the leadership at the Millbrook Culture & Heritage Center to explore ways to expand on-site programming to attract more year-round visitation from visitors beyond the current audience (school, motorcoach, and drive-by tourists); this could be accomplished by offering enhanced scheduled visitor experiences and programming that provide rich and informative hands-on educational opportunities, for example, enhanced programming to learn about the Mi'kmaw perspective on the importance of the Bay of Fundy to the Mi'kmaq People of Se'ke'pne'katik and the often-overlooked history of the original people's struggle to cope with the rapid change to their landscape, political structure, and lifestyle Destination Indigenous https://destinationindigenous.ca/listings/millbrook-cultural-heritage-centre/ <ul style="list-style-type: none"> Explore how the annual Pow Wow can be enhanced and promoted to attract more visitors who stay overnight to expand their understanding of Indigenous culture and heritage Learn from others; for example, from <i>Sunrise When the Salmon Come</i>, whose non-Indigenous name is Cheryl Chapman, who starts by telling the whole story of a destination. She says, “by sharing these truths, visitors are connected to the land, its people, and their shared history – creating a deeper commitment to sustainability and reconciliation” (listen to her story here: https://destinationthink.com/blog/storytelling-tourism-and-reconciliation/?utm_source=Destination+Think+web+newsletter&utm_campaign=7e94f555ea-DMO+Matters%3A+Weekly+Insights+April+1%2C+2019_COPY_01&utm_medium=email&utm_term=0_4a710bb967-7e94f555ea-156583839) 	TM Millbrook FN	ST

Recommendation and Action	Role	Timing
<ul style="list-style-type: none"> Continue to work in partnership with the Mi'kmahey Debert Cultural Centre (MDCC) Board and staff to help ensure the centre becomes a reality. "The Mi'kmahey Debert Cultural Centre will be a place to learn and relive; it will connect and honour those who have come before and those who will come after." This will be accomplished by: <ul style="list-style-type: none"> Sharing Our Stories – Share stories with all audiences, including our communities, educators, students, tourists, and the public Protecting Our Past – Protect and care for the past's spiritual and material resources, including oral histories, traditional knowledge, essential places, archaeological sites, and artifacts from our past Exploring Our Histories – Create the spaces and resources to ask new questions about the past using the historical sciences of geology and archaeology and drawing on the Two-Eyed Seeing approach, https://www.mikmaweydebert.ca/future-centre/vision/ 	TM MUN MDCC	IT MT
<ul style="list-style-type: none"> Engage with the Downtown Truro Partnership, who are looking to establish a rationale to temporarily close Inglis Place during the summer for one weekend a month in 2025 before exploring longer or more permanent closures in the future (Feasibility Study with recommendations to be completed early in 2025) 	DS DTP MUN TM	IT
<ul style="list-style-type: none"> Organize a best-practice mission to Wolfville, NS, to meet with organizers and participants in the FoodArtNature program. Use their experience to encourage potential regional experience providers to create their own visitor experiences. 	TM	ST
<ul style="list-style-type: none"> New year-round experiences must embrace regenerative tourism principles. They must enhance local economies using local products and services, are frictionless, minimize carbon footprint on the landscape, present the cultures and traditions of host communities through connections with local people, be inclusive and welcoming to all, consider visitor needs, and restore ecosystems and community infrastructure. 	TM	IT LT
<p><i>Leverage the region's central and accessible location within the province and its ample accommodation options and meeting venues to grow overnight visitation from the business events market, emphasizing securing new business in the off-season (November – May).</i></p>		
<ul style="list-style-type: none"> To understand and target new business events at a time of the year/months/days when there is accommodation capacity, prepare a Regional Future Bookings Calendar that identifies the need periods over a rolling five-year period 	TM LP TOP Dest Halifax	IT ST
<ul style="list-style-type: none"> Develop a Regional Business Events Asset Inventory that identifies and describes all business event venues, accommodation options, off-site event venues, and meeting suppliers located in the region 	TM TOP	IT
<ul style="list-style-type: none"> Develop a regional Business Events Positioning, a compelling narrative to communicate the benefits and advantages of holding business events in the region 	TM TOP	ST
<ul style="list-style-type: none"> Develop a strategic business events promotion and sales strategy to build new relationships with potential corporate/association meeting planners – understand the needs of these potential clients and present compelling reasons for them to consider the region for future business events 	TM TOP	ST

Recommendation and Action	Role	Timing
<ul style="list-style-type: none"> Strengthen the relationship with the Destination Halifax business events team to facilitate referrals as some event planners desire to meet in Halifax but find space not available or costs beyond the planner's budget, referring these clients to Colchester County, an attractive and viable meeting destination option, helps ensure more business events choose Nova Scotia as opposed to other destinations outside the province 	TM TOP	ST
<p><i>Building on the region's recent and successful activity in the special events market, continue to support promotion and sales activities to secure more major events at the times of the year when business is needed.</i></p>		
<ul style="list-style-type: none"> Utilize the Regional Future Bookings Calendar (see recommendation 7) to identify annual need periods Inventory special events whose specifications align with the region's event assets (accommodation capacity, venue size, seating, access, suppliers, etc.) <ul style="list-style-type: none"> Consider proactive sales strategies that target agricultural-centric events, given the significant presence of agricultural farms/businesses and services located in the region Work with and support the Rath Eastlink Community Centre team to lead and coordinate event-related sales and promotion strategies, given their success in this area 	TM LP TOP TM RECC	IT ST IT ST
<p><i>The region is fortunate to have year-round tourism infrastructure and services to welcome and accommodate various visitors; for this reason, explore the potential to expand the Truro Winter Long John Festival from a weekend to a month-long event in February.</i></p>		
<ul style="list-style-type: none"> In 2026, launch an expanded Truro Winter Long John festival designed to stimulate participation from a broader audience, people who live well beyond the boundaries of Colchester County, who could be convinced to spend at least one overnight in the region because of the entertaining and attractive indoor and outdoor features and vibe of a revitalize and extended-Long John Festival Capitalizing on the event's unique origin, (Johnny Long John, named after John Stanfield, who, along with his brother Frank, developed Stanfield's ever-so-loved Unshrinkable Underwear, introduced and patented an adjustable two-piece long john to keep folks warm in the winter) and celebrate winter based on the style of the region; focus on: <ul style="list-style-type: none"> Indoor experiences – activities that unite people around food, music, storytelling, and learning from community creators and makers, including stage productions, local music performances, comedy acts, art exhibits, etc. Culinary offerings – indoor and outdoor dining featuring a variety of food and beverage providers, showcasing seafood, the collection of diverse/world tastes, and local Nova Scotia beverages Winter outdoor adventure – features a variety of activities and locations, including skating, hiking, fat biking, cross-country skiing, snowshoeing, etc. Organize special family-friendly events focused on snow and no-snow pursuits; consider hosting winter sports competitions for all ages 	TM LP MUN Event Team	IT ST

Recommendation and Action	Role	Timing
<p>during the month (3-on-3 hockey, curling bonspiels, basketball/volleyball/gymnastics, etc.)</p> <ul style="list-style-type: none"> ○ Firepits – central to the winter theme, locate firepits at public gathering points throughout the county, creating unique places for people to gather, connect, warm up and celebrate winter – where possible, locate firepits near food and beverage and entertainment establishments 		
<ul style="list-style-type: none"> ● Secure the services of a photographer/videographer to capture winter images, with specific attention given to the 2026 Long John festival; images can be used in future winter marketing materials 	TM LP	IT
<p><i>Conduct a digital footprint analysis to take proactive steps to maximize the community's online presence (this can be funded through the current STEP budget).</i></p>		
<p>This analysis, which is an update to the process undertaken in 2021, will review all online visitor information sources for the region, including municipal, First Nation, tourism businesses, attractions, and social media tools like Facebook, Instagram, etc. It will indicate information gaps and access quality of all business websites and identify recommendations to enhance the destination's online presence.</p> <ul style="list-style-type: none"> ● Using the analysis results, evaluate the status and effectiveness of existing community-wide tourism websites (Town of Truro, Colchester County, Explore Central NS, Tourism Nova Scotia (TNS), etc.). ● Takes steps to affirm or update the destination community-wide tourism website(s) to ensure there is a comprehensive website that presents all of what the communities within the region have to offer ● Implement capacity-building/training sessions for operators to enhance their websites and social media presence, utilizing training expertise from TNS and others – for example, their Digital Content Marketing program https://tourismns.ca/digital-content-marketing-program ● Develop and feature more regional travel packages on the TNS website (novascotia.com); the free listings can be developed in partnership with guidance from TNS 	TM	IT MT
<p><i>Ground tourism development in regenerative tourism practices.</i></p>		
<p>Throughout the planning process, there was consensus that the strategy should embrace regenerative tourism principles, which will require ongoing dialogue to support a greater understanding that turns knowledge into action at the community and operator levels. A regenerative approach to tourism development involves several elements:</p> <ul style="list-style-type: none"> ● Connecting people and their place in a deep, purposeful, and meaningful relationship ● Putting that shared purpose into action by developing hosting experiences and infrastructure enlivened by local stories, learning, and care ● Working in a manner that grows capacity for flourishing and resilience among people, businesses, communities, and ecologies ● Generating more economic impact at the community and operator level, finding ways for our communities to thrive in the new economy without 	DS MUN LP TOP	ST MT LT

Recommendation and Action	Role	Timing
<p>overtourism and being gentle on the community and its landscapes – balancing economic prosperity with environmental stewardship and social inclusivity</p> <ul style="list-style-type: none"> • Within a regional context, be regenerative in practice by encouraging community-wide and operator-specific actions, such as: <ul style="list-style-type: none"> ○ Buy local goods and services, ensuring everyone is paid a living wage ○ Minimize footprint – eliminate/reduce single-use plastics, for example ○ Be inclusive in everything by ensuring all belong – workforce and visitors ○ Train and develop local storytellers, guides, and facilitators – they reflect local people, culture and traditions through story ○ Price for tourism services, activities, and accommodation levy includes a “give back” component to community projects and charities – invite visitors to leave the place they visit better than they found it – high-value guests support the ideals of regenerative tourism (see Tourism Vancouver Island 4VI case study) • Consider developing and adopting a Regional Regenerative Tourism Vision; for example, the Truro Colchester region is a community of citizens and visitors committed to embracing regenerative tourism practices that leave our unique and beautiful place with a healthier environment, a happier community and a robust hosting economy. (Adapted from Canmore, Alberta’s Regenerative Tourism Framework) 		
<p><i>Identify and address service and infrastructure gaps in collaboration with others, precisely those detrimental to the visitor journey.</i></p>		
<p>Includes, but is not limited to addressing:</p> <ul style="list-style-type: none"> • Inconsistent broadband/cell connectivity throughout the County • Safe public access to more points along the Bay of Fundy shoreline, as well as needed visitor services like more public washrooms • Wayfinding signage throughout the region – quality, frequency, etc. • Limited EV charging stations • Workforce development and labour shortages, including affordable housing for hospitality workers • Consistent service standards at all tourism operations • Public and Active Transportation planning • Recreational facilities, venue enhancements (sites for sports tourism events) 	<p>TM MUN Govt NS TIANS</p>	<p>ST</p>

APPENDIX 1 - WORKING COMMITTEE

Representative	Business/Organization
Miriah Kearney	SEEK Wilderness
Jenn Mantin	County of Colchester
Alison Grant	Town of Truro
Erin Richard	Town of Stewiacke
Hayley Johnson	Millbrook First Nation
David Phillips	Truro-Colchester Partnership for Economic Prosperity
Saribel Delauriers	Downtown Truro Partnership
Matt Moore	Rath Eastlink Community Centre
Chelsea Weatherbee	Truro Colchester Chamber of Commerce
Alana Munroe /Heidi Sponagle	Inn on Prince and Truro Chamber
Patricia McQuillan	Best Western
Alicia Simms	Truro Buzz
Rebecca Blank	Shubenacadie Wildlife Park
Mark Laughlin	Wicked Hops/Alt Hotel
Kristine Stallman	North Shore Community Development Association
Mike Knowlton	Community Leader/ Night Hikes, Victoria Park
Melanie Lowe	Tourism Nova Scotia
Andrea Jackson	ACOA

APPENDIX II - INTERNATIONAL AND NATIONAL TOURISM PERFORMANCE

INTERNATIONAL TOURISM ARRIVALS¹⁴

- International arrivals reached 2019 levels in 2024.
 - An estimated 1.4 billion international tourist arrivals (overnight visitors) were recorded in 2024, about 11% more than in 2023.
- International tourism receipts saw robust growth in 2024 after virtually already reaching pre-pandemic levels in 2023 in real terms (adjusting for inflation and exchange rate fluctuations).
 - Receipts reached USD 1.6 trillion in 2024, about 3% more than in 2023 and 4% more than in 2019 (real terms), according to preliminary estimates.
- Total exports from tourism (including passenger transport) reached a record USD 1.9 trillion in 2024, about 3% higher than before the pandemic (real terms), according to preliminary estimates.
- UN Tourism attributes this recovery to robust demand from major markets and the resurgence of tourism in Asia, which has seen significant growth following pandemic restrictions. Increased air connectivity and visa facilitation also supported international travel.
- According to the UN Tourism Tracker, international air capacity and air traffic virtually recovered to pre-pandemic levels through October 2024 (IATA).
- Global occupancy rates for accommodation reached 66% in November, slightly below 69% in November 2023 (based on STR data).
- Most destinations have seen faster growth in receipts than in arrivals.
 - The Americas recovered 97% (-3% over 2019) of its pre-pandemic arrivals.
- International tourist arrivals are expected to grow 3% to 5% in 2025 compared to 2024.
 - Based on the latest survey of UN Tourism Panel Experts, about 64% of professionals expect 'better' or 'much better' performance in 2025 compared to 2024.
 - Balancing growth and sustainability will be critical in 2025, as reflected by two significant trends the Panel of Experts identified: the search for sustainable practices and the discovery of lesser-known destinations.

¹⁴ Ibid

U.S. TOURISM ARRIVALS

- In 2023, the United States welcomed over 66.5 million international tourists.
 - 31% more than in 2022.
 - 16.3% below the visitor numbers of 2019.
- Total arrivals to the U.S. YTD Aug 2024 were 40.1M.
 - 10.2% more in 2023.
- Of those, 14.1M arrived from Canada.
 - 2% less than 2023.
- And 10.7M arrived from Mexico.
 - 18.9% more than 2023.

NATIONAL TOURISM ARRIVALS¹⁵

- Total overnight visitation to Canada YTD Nov. 2024 was 18.4M arrivals.
 - +9% year-over-year growth.
 - 89% of 2019 levels for the same period.
- Total tourism revenue YTD (Q3 2024) was \$91.9B.
 - +3% year-over-year growth.
 - 111% proportion of 2019 levels.
- Domestic tourism revenue YTD (Q3 2024) \$69.8B.
 - +2% year-over-year growth.
 - 116% proportion of 2019 levels.
- International tourism revenue YTD (Q3 2024) \$22.1B.
 - +6% year-over-year growth.
 - 97% proportion of 2019 levels.
- Hotel Occupancy YTD December 2024 65.7%, down 0. % vs 2023.
- Tourism Employment YTD December 2024 2.1M, up 2%.
- Job vacancy rate YTD December 2024 4.6%, down 2.3%.
- Active tourism businesses YTD October 2024 100.1 up, 1.4%.

¹⁵ Destination Canada Data Collective. Statistics Canada, National Tourism Indicators, January 2025.

<https://www.tourismdatacollective.ca/>

<https://www.tourismdatacollective.ca/tourism-performance-indicators>

APPENDIX III - REGENERATIVE IN PRACTICE EXAMPLES

REGENERATIVE TOURISM – GIVE BACK EXAMPLES

Cornwall Tourism Development Fund

The Cornwall Ontario Tourism Development Fund (TDF) was established in 2019 to support efforts to grow the tourism economy in the City of Cornwall. The Tourism Development Corporation of Cornwall (TDCC) exists to administer the TDF and support tourism development in Cornwall. The TDCC is independent of the City of Cornwall municipal government and operates at arm's length. The TDCC is governed by a Board which is comprised of 3 members who have no direct connection with the tourism industry. It is supported by the advice of the TDF Advisory Committee, whose 11 members have experience with tourism-related enterprises and activities.

The TDF is funded by the Municipal Accommodation Tax (MAT), which is charged to visitors to hotel or inn stays at 4% of the total room cost. The MAT is collected by the City of Cornwall from the hotels and inns quarterly. The City of Cornwall and the TDCC operate through a service agreement to administer the MAT funds. The service agreement states that the city will provide 50% of the MAT collected in the previous year, less a 10% administration fee to the TDCC to administer through the TDF. (A 10% administration fee is collected and retained by the City on the total amount, then the net is divided 50/50 between Cornwall Tourism and the TDCC) The City will also provide the Tourism Coordinator with resources to administer the fund.

<https://cornwalltourism.com/tdf/>

The fund DOES NOT support

- Regular business operation expenses
- Infrastructure
- Business expansion that does not significantly impact Tourism

The Fund DOES support.

- Events taking place in Cornwall and or SD&G that demonstrate a significant impact on the city of Cornwall
- Projects and events that demonstrate their ability to increase tourist attendance overnight stays, and visitor spending in Cornwall
- Innovative strategies to advertise outside the city to potential tourists, increasing visitor attendance and spending

4VI Social Enterprise Group (4VI = For Vancouver Island Tourism)

4TVI, the long-standing regional organization, operates as a non-profit corporation that supports the needs of communities and tourism businesses through government-funded work in the Vancouver Island Region. This organization will continue to work directly with the Ministry of Tourism, Arts, Culture and Sport, Destination British Columbia, Indigenous Tourism BC, the BC Regional Tourism Secretariat, destination management organizations, and other community contributors to steward the region.

Launching alongside its two partners, 4EVER Strategies Inc. is a for-profit corporation that delivers sustainability, storytelling, and strategy services for its clients. The corporation was conceived through dialogues with current and potential clients, partners, First Nations, and the 4VI Group Board of Directors. 4EVER will include community clients such as Tourism Cowichan and Tourism Ucluelet in the Vancouver Island Region. As part of the 4VI Group, 4GOOD, the new charitable giving directive, further aligns with ensuring that travel remains a force for good for Vancouver Island– forever. 4GOOD will continue to build toward the 4VI Group’s 2030 goal of contributing \$10 million back to the residents of the Vancouver Island Region.

As one of the first contributions to 4GOOD, a \$5,000 donation has been made by the Tourism Industry Association of British Columbia to the North Island Marine Debris Removal Project, which engages tourism businesses, visitors, and residents in the removal of marine debris from beaches in the Vancouver Island North Region. <https://forvi.ca/>