

STRATEGIC CONTEXT, CASE STUDY ANALYSIS & BACKGROUND RESEARCH ANTIGONISH TOURISM STRATEGY

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CONTENTS

| | | |
|----------|-----------------------------------------------------------------------------------------|----|
| 1 | Context: Developing the Destination Antigonish Tourism Strategy | 1 |
| 1.1 | Destination Antigonish | 1 |
| 2 | Strategic Alignment with Regional Plans | 1 |
| 2.1 | Antigonish Regional Economic Assessment | 2 |
| 2.2 | Paqtnkek Tourism Strategy..... | 2 |
| 2.3 | DEANS Tourism Strategy..... | 3 |
| 2.4 | Nova Scotia Culture Action Plan | 3 |
| 2.5 | Destination Canada’s Spring 2022 Strategy for Recovery | 4 |
| 2.6 | Nova Scotia Tourism Sector Strategic Plan | 5 |
| 3 | Case Studies | 5 |
| 3.1 | Rise Again 2030 – Cape Breton Island Destination Development Strategy 2021 | 6 |
| 3.1.1 | <i>Tourism Experiences and Trends</i> | 7 |
| 3.1.2 | <i>Rise Again 2030 - Vision and Themes</i> | 8 |
| 3.1.3 | <i>Key Takeaways</i> | 9 |
| 3.2 | Village of Alma, New Brunswick – Vision Alma | 9 |
| 3.2.1 | <i>Context</i> | 10 |
| 3.2.2 | <i>Strategic Areas of Focus</i> | 10 |
| 3.2.3 | <i>Key Takeaways</i> | 10 |
| 3.3 | Wolfville, Nova Scotia | 11 |
| 3.3.1 | <i>Context</i> | 11 |
| 3.3.2 | <i>Strategic Areas of Focus</i> | 13 |
| 3.3.3 | <i>Key Takeaways</i> | 13 |
| 3.4 | The Town of Orangeville Tourism Strategy and Action Plan 2021-2026 | 13 |
| 3.4.1 | <i>Target Markets</i> | 14 |
| 3.4.2 | <i>Priorities for Tourism Development</i> | 15 |
| 3.4.3 | <i>Strategic Themes</i> | 15 |
| 3.4.4 | <i>The Strategic Plan</i> | 16 |
| 3.4.5 | <i>Key Takeaways</i> | 16 |
| 3.5 | City of Mississauga Tourism Master Plan | 16 |
| 3.5.1 | <i>Target Markets</i> | 17 |

| | | |
|------------|----------------------------------|-----------|
| 3.5.2 | Context..... | 17 |
| 3.5.3 | Strategic Areas of Focus..... | 18 |
| 3.5.4 | Key Takeaways..... | 19 |
| 4 | Background Research..... | 19 |
| 4.1 | National Context | 19 |
| 4.2 | Nova Scotia Context | 21 |
| 4.2.1 | Visitor Profile | 22 |
| 4.2.2 | Tourism Trends..... | 24 |
| 4.3 | Antigonish Context | 25 |

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1 Context: Developing the Destination Antigonish Tourism Strategy

Antigonish Town and County teamed up with local tourism partners to create the Destination Antigonish Working Group. This group includes Destination Eastern and Northumberland Shores (DEANS), Paqtnkek Mi'kmaw Nation, St. Francis Xavier University (St. FX), the Antigonish Chamber of Commerce, the Town of Antigonish and the Municipality of the County of Antigonish. The Destination Antigonish Working Group oversees the Destination Antigonish Tourism Strategy's development. Group ATN were contracted to develop a tourism strategy for the region to increase tourism activity and visitor yields while supporting tourism operators in growing their capacity.

This background document presents the strategic context, case study analysis and research to support the development of the strategy.

1.1 Destination Antigonish

Antigonish tourism groups are taking steps to enhance the local tourism industry by creating strategic partnerships. The goal is to combine resources to strengthen the tourism landscape while ensuring sustainability.

In recent years, Antigonish has made strides to enrich tourism by attracting major events like the Grand Slam of Curling and the 2018 Special Olympics. Events like the annual Antigonish Highland Games and Nova Scotia Summer Fest, held at Columbus Field, have widespread appeal and are proven economic generators,¹ attracting visitors from around the Maritimes and beyond.

Notably, after extensive community engagement, both Antigonish town and county councils voted to ask the province to for special legislation to consolidate the two municipal units to better serve the region of Antigonish. The outcome of this request to the province has yet to be determined.

2 Strategic Alignment with Regional Plans

The tourism plans adopted by several Nova Scotia entities provide useful contextual considerations for developing the Antigonish Tourism Strategy. Group ATN has analyzed these plans to identify opportunities while ensuring strategic alignment between tourism initiatives, which will support efficiencies and leverage partnerships throughout the province. We profiled the following tourism strategies:

- Antigonish Regional Economic Assessment
- Paqtnkek Tourism Strategy
- DEANS Tourism Strategy

¹ 'Antigonish Regional Economic Assessment - Final Report'.

- NS Culture Action Plan
- Destination Canada's Tourism Vision
- Indigenous Tourism Association of Canada Strategy; and
- Cultural Tourism Strategy for the Mi'kmaw of NS.

Considering these plans will ensure strategic alignment while acting as a force multiplier for Destination Antigonish.

2.1 Antigonish Regional Economic Assessment

The Antigonish Regional Economic Assessment addresses tourism, highlighting opportunities for collaboration and positioning Antigonish in the broader Nova Scotia tourism context. The assessment suggested several actions.

Some of these actions included addressing infrastructure needs, such as internet upgrades to provide wider access and better connectivity to support tourism growth.

The assessment also recommended creating promotional YouTube videos. YouTube has wide appeal and targets a younger demographic. Videos would allow the municipality to showcase events and activities while fostering audience connections.

In addition, the assessment identified a strategic opportunity: "the Outlander Effect." Through the television show *Outlander*, Celtic and Gaelic heritage have grown in popularity, particularly in North America, Europe, and China. To leverage this interest, the report suggested a "History Trail" on which tourists could travel through a variety of historic monuments and locations associated with the heritage featured in *Outlander*. Interestingly, Tourism Nova Scotia (TNS) recently issued a request for proposals examining *Outlander's* influence on tourism in Nova Scotia.

The importance of coordination with First Nations groups was also emphasized. This opportunity is further explored within the Paqtnkek Tourism Strategy.

2.2 Paqtnkek Tourism Strategy

The Paqtnkek Tourism Strategy identifies the Community's strengths, weaknesses, and strategic opportunities for expanding tourism to engage tourists and Community members in Mi'kmaw cultural experiences. The strategy notes that Paqtnkek Mi'kmaw Nation is in the early stages of tourism development. The strategy also discusses programs and resources that are available to support Indigenous tourism, like the Tourism Recovery Fund.

The strategy highlights opportunities related to the Paqtnkek's heritage and natural assets, while considering increasing interest in Indigenous cultural tourism. The strategy also identifies the Community's priority EQ (Explorer Quotient²) market segments (i.e., cultural explorers and authentic experiencers). The plan discusses the potential to provide Elder engagement while

² Destination Canada "[Tools: What is Explorer Quotient?](#)"

highlighting the advantages of building on other recent Community developments, including the new Bayside Travel Centre. The centre boasts a gas station, liquor store and a convenience store for travellers. The Visitor Information Centre provides travellers with an understanding and appreciation of the visitor experiences in the Community. Additionally, the centre provides a space for Community members to display and sell crafts and art.

The strategy identifies one weakness: an overall lack of differentiation from the rest of the province. Paqtnkek is in the process of finding its unique voice and brand to stand out from other regions. The strategy also stipulates that there are certain Paqtnkek resources and cultural events that are sacred and should not be shared with non-Community members. In engaging tourists in Mi'kmaw culture, attention and respect must be given to those events which are strictly ceremonial.

2.3 DEANS Tourism Strategy

The DEANS Tourism Strategy identifies four foundational pillars:

- *Destination Marketing* – Build out the tourism brand, increase visitation in the shoulder season and establish a strong financial base.
- *Visitor Services* – Innovate the visitor services experience to positively impact tourism growth.
- *Partnerships Development* – Increase visitor awareness of diverse tourism experiences through partnerships with government or complimentary businesses who may offer targeted tourism packages. These partnerships extend to social media influencers, who promote locations and/or experience to a wide range of listeners/followers; and
- *Events* – Develop an events strategy and associated budgeting with critical investment coordination.

The DEANS Strategy identifies Halifax and the rest of Atlantic Canada as a primary target market, particularly considering the travel limitations resulting from COVID. Many Atlantic Canadians want to travel and experience their own backyard in new and exciting ways due to ongoing uncertainty and reluctance among some to commit to long-haul travel.

2.4 Nova Scotia Culture Action Plan

The Nova Scotia Culture Action Plan (CAP) outlines priority themes regarding the protection, promotion, and development of Nova Scotia's culture. While some of these efforts do not directly reference tourism, there are clear connections between CAP's goals and the promotion and development of new tourism opportunities across the province.

The plan focuses on six pillars under the leadership of the Department of Communities, Culture, Tourism and Heritage (DCCTH):

- *Promote Mi'kmaw Culture* – Highlighting steps to protect, support, and promote Mi'kmaw culture in Nova Scotia and beyond. Some proposed actions under this theme

underscore tourism efforts to enhance support for Mi'kmaw arts and ceremonies, and to emphasize that Mi'kmaw culture is Nova Scotia's first culture.

- *Promote Creativity and Innovation* – Making Nova Scotia communities more attractive and economically successful through the development of cultural enterprises. Under this theme, DCCTH supports the development of new cultural hubs, such as libraries and museums, as well as further supporting the improvement of rural internet access to enhance cultural innovation and expression.
- *Strengthen Education, Partnerships and Understanding* – Promoting Nova Scotia culture in schools, including initiatives to assist post-secondary institutions in equipping creative workers with entrepreneurial and cultural export skills.
- *Advance Cultural Diversity* – Promoting and protecting Nova Scotia's cultural diversity including efforts to eliminate discrimination and strengthen the resources and opportunities available to various cultures throughout the province. This pillar includes coordination with Tourism Nova Scotia to promote the province's cultural diversity and related experiences.
- *Excellence in Cultural Stewardship* – Developing and supporting Nova Scotia's cultural sites and history. This pillar includes investing in the Nova Scotia museum system to better allow museums to harness provincial culture and attract new visitors, as well as fostering partnerships in support of Nova Scotia Archives to showcase the province's diverse heritage; and
- *Drive Awareness and Economic Growth of the Culture Sector* – Growing Nova Scotia cultural businesses by exporting globally. Examples include a "Buy Nova Scotian" campaign building on success in the tourism sector, strengthening the film and TV industry in the province and creating a government-wide strategy for developing and attracting events emphasizing the province's culture.

While the CAP was developed prior to the onset of COVID, DCCTH's 2021-2022 Business Plan indicates that DCCTH continues to use the Culture Action Plan to guide their efforts.

2.5 Destination Canada's Spring 2022 Strategy for Recovery

Destination Canada's Spring 2022 Strategy for Recovery outlines a Canada-wide approach to support post-COVID touristic recovery between 2022-2025. Working to "support the 225,000 small- and medium-sized tourism businesses across Canada and their communities," the strategy outlines the current state of the international tourism market in relation to Canada and the contexts behind people's desire/ability to travel.

The strategy identifies three primary market segments: *International Business Events* outlines six major economic growth sectors, primarily in large urban hubs. The other two market segments are *Domestic Leisure* travellers mainly from urban centers and *International Leisure Travelers* - those from the United States, United Kingdom, France, Germany, Mexico, Australia, Japan, South Korea and China.

Within these groups, Destination Canada targets “High-value guests” with above-average incomes who travel frequently and are more likely to return to Canada. “High-value guests” appreciate cultural and local experiences and spend money on locally produced products.

The overarching goals of this strategy are to increase tourism revenue, improve Canada’s image in the minds of visitors and expand Canadians’ perceptions of the economic importance of tourism.

2.6 Nova Scotia Tourism Sector Strategic Plan

Currently under development, the new Nova Scotia Tourism Sector Strategic Plan aims to outline a broader, integrated, and sustainable path to industry growth as the province’s tourism sector begins to recover from the significant impacts of the pandemic. Taking advantage of the Nova Scotia tourism economy’s ongoing rebuilding efforts, the plan intendeds to lay out a forward-thinking approach to a post-COVID tourism industry and new paths for industry growth.

The strategic plan is expected to consider the following:

- Input from tourism stakeholders, including Tourism Industry Association of NS’s (TIANS) Advancing Change Document, Communities, Culture, Tourism & Heritage’s tourism mandate priorities, tourism businesses, sector organizations, local, regional and federal government stakeholders.
- The needs of Nova Scotians and their communities.
- Fostering sustainable tourism growth.
- The role of tourism growth within the broader provincial economic framework.
- The needs and expectations of visitors.
- Global, national, and provincial tourism trends; and
- The impact of the pandemic.

Though currently in its early stages, the plan is expected to be completed in 2023.

3 Case Studies

The case studies profile below exemplify the strategies used by other destinations to bolster tourism. This analysis provides an enhanced understanding of tourism development plans and growth strategies employed in other Canadian destinations while informing the creation of a comprehensive tourism strategy for Antigonish. The regions chosen for the case study review were selected based on the relevance of the lessons learned to Antigonish.

- Rise Again 2030 – Cape Breton Island Destination Development Strategy 2021
- The Town of Orangeville Tourism Strategy and Action Plan 2021-2026
- City of Mississauga Tourism Master Plan
- Vision Alma - Village of Alma; and

- The Town of Wolfville.

3.1 Rise Again 2030 – Cape Breton Island Destination Development Strategy 2021

In 2021, Destination Cape Breton and its partners established a new tourism strategy for Cape Breton Island, Nova Scotia: [Rise Again 2030](#). The goal of *Rise Again* is to support the long-term growth of Cape Breton tourism. The strategy involves planning, policy, and capacity building to enhance the island to a world-class tourism destination.

Highlights the links between tourism appeal and culture, the strategy divides the island into cultural sectors.

Rise Again also emphasizes the impact of social media, which catalyzed the Atlantic Canada Opportunities Agency (ACOA) to launch communities of interest (COI) programs in partnership with other stakeholders, mobilizing local influencers around certain COI's (such as hiking). Social media influencers are particularly able to attract younger visitors, such as Gen-Z's and Millennials.

The strategy outlines a network of plans to foster strategic alignment:

- Federal Tourism Growth Strategy
- ACOA Tourism Innovation Action Plan
- Tourism Nova Scotia Strategic Plan 2018-2023
- Develop Nova Scotia Business Plan
- Nova Scotia Culture Action Plan
- Nova Scotia Event Strategy
- Cape Breton-Unama'ki Economic Development Plan
- Indigenous Tourism Association of Canada (ITAC) Five-year Plan
- Pan-Atlantic Indigenous Tourism Framework
- Cultural Tourism Implementation Plan for the Mi'kmaq of Nova Scotia; and
- Cape Breton University Strategic Plan

The strategy acknowledges that Cape Breton Island's tourism industry struggled as a result of the pandemic. Although the short-term strategy has been adjusted due to the pandemic, the long-term strategy, however, remains largely unchanged.

The situational analysis highlights the growth of room nights sold in Cape Breton relative to Nova Scotia as a whole since 2011. The Plan also considers Parks Canada admissions and cruise ship passenger growth. Highlights of Cape Breton's *Rise Again 2030* strategy include:

- There is an opportunity to enhance the visitor economy by increasing the diversity of high-quality shopping experiences in some communities, educating visitors on less visited areas of the Island and enhancing the pedestrian friendliness of some downtowns and main streets.

- Increased demand for niche and sharing economy accommodations.
- Seasonality presents a continued challenge. Cape Breton is experiencing growth in tourism in the winter months, though there are concerns that seasonal accommodations are not winterized, and dining options are limited. There is growing attention on the shoulder season, using events and conferences as a means of boosting tourism.
- Culture and heritage are emphasized, referencing the Island's culture tourism cluster. There is growing interest in culture including Mi'kmaq. Enhanced engagement with cultural organizations, artists and producers is imperative to the development of cultural tourism.
- Culinary opportunities are vast including pairing this with other initiatives (e.g., cultural cuisine); and
- Outdoor activity has boomed in popularity, increasing the appeal of active experiences such as hiking, biking, and kayaking. The Cabot Trail and other natural areas have intense appeal for these travellers.

3.1.1 *Tourism Experiences and Trends*

Rise Again profiles the "motivating experiences" that led tourists to choose Cape Breton Island for their vacation:

- **Sightseeing** – highlighting the Cabot Trail and the Island's seaside location.
- **Adventure and exploration** – the Cape Breton Highlands provide world-class hiking experiences with an array of outdoor activities available across the Island.
- **Culture** – Cape Breton has a strong cultural festival offering originating from the Gaelic, Acadian and Mi'kmaq heritage.
- **Historic experiences** – including the Fortress of Louisburg and Alexander Graham Bell National Historic Site, among many others.
- **Culinary opportunities** – seafood and small farm-to-table restaurants provide a range of culinary experiences; and
- **Sports and music** – activities like golf, live music (e.g., Celtic Colours and KitchenFest), and large events like the Scotties Tournaments of Hearts are important travel motivators.

Emerging tourism trends reflecting advancing technology, increased awareness of climate change and a desire for togetherness brought on by COVID were examined:

- **Responsible tourism** – has risen in popularity due to increased traveller awareness of the environmental, cultural, and social impacts.
- **Smart tourism and virtual meetings** – have been enabled by technologies. For example, attractions can communicate wait times and businesses are increasingly allowing their employees to work remotely. Conversely, increased digital meeting capability has reduced the need to travel.
- **Wellness travel** – includes activities like yoga, mindfulness retreats and healthy eating. Aging populations mean that many travellers are seeking accessible physical activities. The key demographic seeking wellness opportunities are women between 30 and 60 years of age.
- **Place DNA and communities of interest** – refer to experiences in the place itself (“place DNA”) and community surroundings, while communities of interest refer to opportunities to foster communities of travellers around similar interests.
- **Destination stewardship and destination marketing/management organizations** – have been increasing in popularity; and
- **Tourism clusters** – are groups of organizations that cluster both geographically and economically, providing complementary products or services.



Figure 1. Yoga pictured in the *Rise Again 2030 Strategy*

3.1.2 *Rise Again 2030 - Vision and Themes*

Not only does the *Rise Again 2030* tourism strategy outline values, principles and vision, but also game changers, opportunities and themes required to ensure that Cape Breton tourism can achieve that vision. The vision highlights benefits and wealth creation for residents and tourism

businesses, while providing opportunities for authentic cultural experiences and outdoor adventure. Strategic themes included in *Rise Again 2030* encompass:

Core values outlined in the *Rise Again 2030* strategy include:

- Care for community
- Authenticity
- Diversity, inclusion and respect
- Creativity
- Growth, capacity and leadership
- Sustainability

- Product and experience innovation
- Sustainable tourism development
- Strengthening the tourism business climate
- Striving for excellence in visitor experiences
- Workforce enhancement; and
- Evolving Destination Cape Breton to support further industry growth.

3.1.3 Key Takeaways

Key takeaways arising from the review of the Rise Again 2030 tourism strategy include:

- Culture and cultural events are key elements of the Island's unique selling proposition.
- Outdoor activities and experiences are similarly important with the Cabot Trail and the Cape Breton Highlands catching the attention of adventurers and sightseers.
- Seasonality is being tackled through the winterization of venues; hosting conferences and events; and boosting the availability of amenities in the winter and non-peak seasons; and
- Niche and sharing economy accommodations present locationally unique experiences for travellers along with opportunities to engage in the local community.

3.2 Village of Alma, New Brunswick – Vision Alma



Despite its winter population of only 213 people, the village of Alma on the Bay of Fundy in southern has enjoyed increased tourism in recent years.³ Alma is about an hour's drive from Moncton – New Brunswick's largest urban center – and is considered a gateway to Fundy National Park. Alma services the tourism industry, from the Fundy Trail to Hopewell Cape.

Alma has achieved international recognition as a quaint village and was named one of Expedia's top 10 cities to visit in Canada in 2016.⁴ Though the village was somewhat puzzled by its inclusion - due to it not being a city - they were nonetheless thrilled to be profiled by Expedia. Alma regarded the listing as a great promotional opportunity and noted increased activity in their tourism channels following the article's release.

Tourism is considered one of Alma's core industries and is often linked to the village's other key industry - fishing. Alma's maritime economy and culture influences tourism offerings, with accommodations, retail and culinary services revolving around nautical themes. Alma also uses its proximity to Fundy National Park and other outdoor spaces as a primary tourist draw. Before the onset of COVID, Alma created a rural plan outlining the town's future. The plan cited tourism as a core element of Alma's future. Alma was also the catalyst for [Mountain Bike Atlantic](#).

³ Statistics Canada, "[Census Profile, 2016 Census](#)"

⁴ Expedia, "[10 Canadian Cities you must visit in 2016](#)"

The village was deeply impacted by the pandemic. Post-COVID, the town is struggling to meet tourism demands due to ongoing labour shortages.

3.2.1 Context

Tourism New Brunswick's [webpage](#) highlighting Alma describes its natural assets, including beaches and fossil-laden shorelines for summer visitors, and snowmobile trails and winter camping for cold-weather guests. Alma enthusiastically promotes its oceanside location in its visitor marketing, highlighting the Bay of Fundy and its claim on the highest tides in the world as a draw.

Drawing on the visual appeal of its fishing industry, the village advertises its picturesque wharf and traditional maritime vistas as a main attraction and site for photography. The influence of Alma's fishing industry extends into many of its other tourist offerings, including accommodations, restaurants and retail.

Other than recreational fishing, the village promotes activities at Fundy National Park, such as kayaking, swimming in seawater pools, hiking and birdwatching. The website also mentions winter activities in and around the village, such as snowmobiling, skiing, skating and snowshoeing.

3.2.2 Strategic Areas of Focus

- Proximity to the Bay of Fundy
- Fishing (lobster and scallop), seafood
- Outdoor activities – mountain biking, golf, hiking, kayaking, among others
- Artisanal dining – sticky buns and craft beer
- Photography; and
- Expansion into the winter season.

3.2.3 Key Takeaways

Our case study of Alma's tourism strategy yielded the following key takeaways:

- Alma's traditional identity as a fishing community is the backbone of its tourism industry, serving as the main inspiration and theme for much of the village's dining, accommodation, and attractions.
- Many of Alma's core tourism experiences rely heavily on the village's natural features, with outdoor activities and images of its small, picturesque fishing village featured in its marketing material; and
- The town aims to extend tourism into the winter to boost year-round tourism.

3.3 Wolfville, Nova Scotia

The Town of Wolfville, NS is situated along the coastline of the Bay of Fundy, featuring a base population of roughly 5,000,⁵ with approximately 3,500 students from Acadia University residing in and around the town during the academic school year.⁶



While the town has strong economic ties to Acadia University, tourism is also vital to Wolfville's economy. Before the pandemic, the town welcomed some 190,000 visitors.⁷ While these numbers were noticeably impacted by the onset of the pandemic, the tourism sector in the region has seen visitors beginning to return.

3.3.1 Context

Much of Wolfville's tourism offerings rely in some part on nature and the lands surrounding the town. Outdoor exploration and local landscapes are prominent visuals in many Wolfville marketing materials, and the town's proximity to various walking and hiking trails - Acadian dykes, surrounding farmland and nearby Blomidon Provincial Park - all serve to connect the Wolfville tourism experience with the lands surrounding the town. Grand-Pré National Historic Site is promoted as a key regional attraction, highlighting the historical presence of Acadians.

Further capitalizing on its connection to the land, Wolfville heavily integrates the local agricultural industry into tourism. Culinary attractions receive a strong focus, with many of the town's restaurants and the Wolfville Farmers Market promoted through an ethos of farm-to-table cooking and use of local ingredients.

Wolfville has also taken steps to further increase appeal in its dining during the summer by installing temporary extended walkways and patios along their main street in front of many of the town's restaurants. Outdoor patio seating increases dining capacity and allowing diners to enjoy eating outdoors.

Another highly advertised attraction is the region's robust, world-class wine industry. Wolfville is within 10 km of eight wineries. Leveraging this compelling winery industry, the town championed a wine bus - the "Magic Winery Bus" - tour aboard a British-style double-decker bus which allows

⁵ Statistics Canada, "[Census Profile, 2021 Census of Population](#)"

⁶ Acadia university, "[About Acadia](#)"

⁷ Town of Wolfville, "[Municipal Planning Strategy](#)"

passengers to visit multiple wineries and do wine tastings in one day. Restaurants in the town have integrated local wines into their menus, alongside local beers and ciders.

Moreover, Devour! The Film and Food Fest is a high-profile culinary film festival that takes place annually in October. Devour! is the world's largest culinary film festival. Celebrity chefs such as Anthony Bourdain, actors like Jason Priestly, and food journalists like Lucy Waverman have all appeared at the festival in past years. DEVOUR recently announced a dedicated facility arising from the success of the event coupled with the vision and the passion of the staff and volunteers.

The town's vibrant musical culture can be seen in the annual Deep Roots Music Festival, which features folk and bluegrass musicians from the Maritimes and beyond. Additionally, a new initiative spearheaded by the Town and Deep Roots Music Cooperative is the Wolfville Summer Concert Series, held at the picturesque waterside park on the Minas Basin, which features local resident and student musicians. There are also several weekly local musical offerings, including Paddy's Pub traditional music sessions and open mics, and T.A.N. Café's weekly open mic.

The majority of Wolfville's retail offerings are centred on, or neighbouring, Main Street. These stores generally cater to a variety of markets, with many focusing on handmade artisan and locally significant goods, in addition to retail amenities such as pharmacies, a grocery store, and hardware store. Most retail shops, cafés and restaurants are in close proximity, fostering a compact, walkable and accessible tourism experience.

Acadia University and its facilities occupy a significant portion of the town's real estate. The university is intrinsically linked to the town's economy. The historic nature of Acadia's campus enhances the town's draw for visitors, along with the KC Irving Centre Botanical Gardens and art gallery. In the summer, Acadia offers its student residence accommodation to visitors at affordable rates. Additionally, Acadia's athletic facilities have created significant opportunities for sports-based tourism. In July 2022, Raymond Field was used to host the first Canadian Football League game in Nova Scotia's history, drawing a reported 10,000 individuals to the town.⁸

The tourism industry has long offered boutique, quaint B&B accommodations, often in historic buildings such as Tattingstone Inn, Blomidon Inn, and a new development, 470 Main, which is marketed as luxe, modern suites in downtown Wolfville.

The town also has a booming wedding industry and has seen an increase in destination weddings to the town and surrounding region. Businesses such as the [Wolfville Wedding Chapel](#), [Domaine de Grand Pré](#), [Lightfoot and Wolfville Winery](#), [East Coast Pop Up Weddings](#), and more all boast impressive wedding packages.

Finally, the town has an established social media campaign called #WhenInWolfville. This hashtag, which also has an accompanying Instagram account, encourages residents and visitors alike to post photos of their adventures and experiences in Wolfville, serving to create a sense of

⁸ Acadia University, "[CFL Football Game](#)"

community and further attract visitors through social media. [The Instagram account](#) has just under 10,000 followers.

3.3.2 Strategic Areas of Focus

Strategic areas of focus for Wolfville include:

- Outdoor and scenic experiences
- Festivals and cultural events in music, food, film, and theatre
- Local wineries and wine tourism; local cider; craft beer
- Culinary offerings often with local produce
- Farmer's market – weekly market offerings and daily market retail shop
- Centralized, walkable downtown area
- Shopping opportunities and locally made goods
- Plentiful accommodations; and
- Boutique wedding industry.

3.3.3 Key Takeaways

Key takeaways arising from our case study analysis of Wolfville include:

- The town integrates its natural features and those of the surrounding area into its tourism efforts, both as activities that visitors can explore, and as a selling point for local food and products.
- The image of a welcoming, cozy, progressive and active small town anchors Wolfville's tourism identity.
- The compactness and walkability of the town are important components of its tourism offering.
- Acadia University's aesthetic, amenities and historical gravitas contribute to the Town's unique selling proposition; and
- Wolfville's tourism offering is diverse and well-integrated, with all of its touristic offerings holistically supporting one another.

3.4 The Town of Orangeville Tourism Strategy and Action Plan 2021-2026

Orangeville is a town in southern Ontario with a population of almost 31,000. Half of its population is urban, while the other half resides rurally. The town is just over 80 km from Toronto, 55 km from Guelph and nearly 150 km from St. Catharines.

To boost its tourism industry following the impacts of COVID, the Town of Orangeville developed its *Tourism Strategy & Action Plan 2021-2026*. The plan considers the current state of tourism in Orangeville before addressing its vision, mission and values for Orangeville going into the future. The plan aligns with the town's 2018 Economic Development Strategy.

The plan outlines goals to guide tourism success while highlighting town assets and their strategic utilization. Visitor attractions and themes like culture, outdoor activity and small-town charm are addressed. The plan also highlights the Credit Valley Explorer Train, Theatre Orangeville and the Blues & Jazz Festival.

Orangeville’s plan considers the impacts of COVID. They frame the first few years of the plan as a rebounding period recovering from a prolonged freeze on live events and performances on which the town relies. The plan identifies the advantage afforded by its proximity to Toronto, in that many travellers are looking to stay closer to home due to continued uncertainty around the pandemic.

Orangeville’s Five-Year Vision:

“By 2026, the Town of Orangeville will be a burgeoning tourism destination known for its unique combination of progressive community values and small-town vibe, which both locals and visitors look to for unique public & performing art experiences, culinary imbibement, and access to outdoor activities, knowing there is something to enjoy year-round.”

3.4.1 Target Markets

The Orangeville Plan discusses its target markets, providing an infographic (Figure 2) of its current market and strategic targets.

It identifies the **socially conscious traveller** as a key target demographic based on the proportion of visitors with young families and who are visible minorities. Socially conscious travellers are those who seek sustainable entertainment sources and prioritize equity businesses while understanding their economic influence. Other target markets for the Orangeville include:

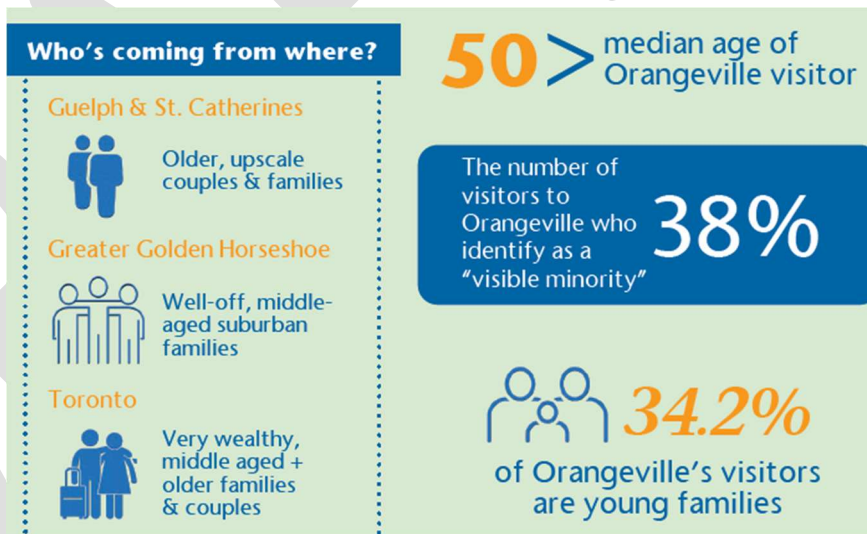


Figure 2. Town of Orangeville Tourism Target Market Infographic

- **Connected explorers** - young adventurers who feel a need to travel and enjoy various experiences. This segment is technologically savvy.
- **Mature couples** are around the age of retirement and are motivated to preserve a sense of vitality. They require a connection with people and the world.
- **Knowledge seekers** are seeking to understand the destinations they visit. They enjoy exploring history and culture and commonly engage in sightseeing and museum visits.
- **Up-and-coming explorers** often focus on core tourist attractions. They are entering a new life phase and are highly curious; and

- **Nature lovers** are attracted by parks, lakes and outdoor activities like camping and hiking.

3.4.2 *Priorities for Tourism Development*

Four strategic priorities are identified in the strategy, all of which will expand tourism assets, ensure adequate staffing and define a tourism brand:

- **Administration and operations** – prioritize the internal work of the town including staffing and resourcing, priorities and processes.
- **Branding and promotions** – effectively and inclusively promote the town and provide visitors with resources for a positive experience.
- **Tourism assets and experience development** – leverage existing resources and identify potential new tourism assets with a particular focus on arts and culture; and
- **Infrastructure and investments** – maintain current infrastructure and invest in new development where necessary.

In a comparative analysis of similar cities, the plan outlines **arts and culture** as a strategic area of focus. The Orangeville Strategy emphasizes affordability/accessibility, inclusivity/diversity and increased awareness of/investment in the arts.

Two other areas of focus identified are **culinary tourism** and **developing the downtown core**. The plan acknowledges the Stratford Culinary Trail comprised of local artisans in close proximity as a convenient attraction for culinary-motivated travellers. Developing the downtown core includes priorities such as streetscaping, infrastructure upgrades and enhanced community activities.

3.4.3 *Strategic Themes*

Orangeville's plan identifies several themes that emerged through their community engagement and research:

- The town is positioned to build on its historic events, like the Blues & Jazz Festival, to bring together local artists;
- Natural assets, like the Bruce Trail, can be leveraged;
- Growth in the non-peak season is necessary – rather than a summer-only focus. Stable growth will support community sustainability;
- Attention to brand identity will help put Orangeville on the map; and
- There is an opportunity to appeal to those travelling between Toronto and cottage country, enticing them to stop in Orangeville rather than pass by.



Figure 3. Town of Orangeville sign

3.4.4 The Strategic Plan

The Orangeville strategy features the community as a key draw for tourists through art and performing arts, outdoor activities and food and drink. Orangeville highlighted five values:

1. **Sustainability** – slow and intentional growth allows Orangeville to expand its tourism industry while respecting residents and the natural environment.
2. **Diversity and inclusion** – inclusive engagement, staffing, marketing, and promotions ensures people of all backgrounds are included in tourism development and reflected in community activities.
3. **Collaboration** – public and private organizations collaborate to advance tourism development and success.
4. **Appreciation** – understanding and appreciating Orangeville's existing assets; and
5. **Safety** –welcoming spaces provide a sense of community and cultivate togetherness.

3.4.5 Key Takeaways

Key takeaways arising from the Orangeville case study analysis include:

- Orangeville intends to appeal to large, nearby markets like Toronto and surrounding cities to grow its domestic visitor base.
- The town is prioritizing sustainability and inclusivity to attract socially conscious travellers by providing diverse experiences that consider interests from a range of groups.
 - Antigonish could similarly appeal to socially conscious travellers by partnering with organizations like the Coady Institute or Peace by Chocolate and building on the opportunities they've presented.
- Arts and culture, outdoor activity and culinary experiences are strategic areas for tourism opportunities.
- Streetscaping and infrastructure upgrades partnered with more community activities will enhance the appeal of the downtown core for visitors and residents alike; and
- Orangeville plans to focus on shoulder-season growth with off-season events, culinary experiences and more.

3.5 City of Mississauga Tourism Master Plan

The City of Mississauga developed its *Tourism Master Plan* to guide tourism growth and align initiatives with the city's strengths. The plan will guide future investment and outlines a five-year framework to grow the tourism industry according to tourists' needs.

Stakeholders engaged throughout the development of the plan include:

- Hotels

The Mississauga Tourism Plan centers on **building brand recognition - particularly in sports and culture**. The plan recognizes that **tourism can benefit the community's economic growth**, while highlighting **investment opportunities** for the city.

- Conference facilities
- Sport facilities
- City staff; and
- Tourism Toronto staff.

3.5.1 Target Markets

In assessing international travellers, mainly from the United States, the plan points to four relevant elements: social and emotional, travel experiences, the importance of travel, and the use of technology in travel and travel decisions.⁹ The plan identified the following traveller segments:

- **Sports Lovers** – Males aged 35-54 who see themselves as very active, taking part in sports events or activities.
- **Up and Coming Explorers** – Young families in pursuit of adventurous experiences.
- **Family Memory Builders** – Use travel as an opportunity to bond further with their family.
- **Knowledge Seekers** – Higher-income couples - often recent empty-nesters - who are interested in expanding their knowledge. They prioritize history, arts and culture; and
- **Business Leisure** – Spend heavily within the city because of its proximity to the airport, and often add leisure to their business trips.

3.5.2 Context

The City of Mississauga plan notes an uptick in visitor interest in **cultural tourism** while highlighting cultural festivals like the one shown to the right, places of worship, galleries and museums as key activities and locations to promote in pursuit of growth in this area.



Though many travellers often spend a portion of their budget on cultural activities, data examined during the creation of the plan reports that

cultural tourists typically spend almost twice as much during travel relative to other tourists overall. Many cultural vendors further benefit the community, not only by providing tourist experiences, but also through educational opportunities.

⁹ Local travellers were also assessed and were assumed to be similar to those in bordering states like Michigan.

Sports tourism focuses on specific events to attract an influx of tourists during marathons and tournaments. A wide demographic can be represented in this category – middle-aged marathon runners and/or youth may bring their families and extend their stay, building a vacation around the excursion.

Indigenous tourism is as a way for Indigenous communities to share their history and culture while increasing economic capacity.

Culinary tourism frames dining experiences as a way to create connection to the community through food and culinary storytelling.

Mississauga's Tourism Master Plan assigns city assets to categories corresponding with the above trends. The plan discusses some of Mississauga's sports and entertainment centres and highlights the benefit of clustering tourism products – for example, locating cultural and culinary experiences near sports centres to encourage travellers to engage with multiple tourism businesses with easy access. The plan also examines retail opportunities created when there is sufficient critical mass in one location to create a travel generator, such as Mississauga's Square One Shopping Centre.

Parks and natural areas are another opportunity. Related initiatives include a "Heritage Route" along a notable river, with hiking and biking experiences that can also engage the location's history.

Finally, the plan considers conference facilities and hotels. Having accommodations near popular conference spots and further collaboration with other entities like the Square One Shopping Centre are necessary to provide enhanced conference experiences for business travellers.



3.5.3 Strategic Areas of Focus

The Mississauga Plan highlights the following strategic areas of focus:

- Develop tourism product clusters.
- Continue to invest in festival programming.
- Focus municipal planning on developing creative communities to attract visitors.
- Develop and implement a program for funding tourism activity and infrastructure.
- Position the Mississauga brand to target tourism opportunities and develop a tourism campaign.
- Align tourism messaging with resident communications.
- Create and fund efficient structures to advance tourism.

- Assess and develop strategic partnerships; and
- Position Mississauga as welcoming for locals and visitors alike.

3.5.4 Key Takeaways

Key takeaways arising from the Mississauga case study analysis include:

- Explorers and adventurers are a prominent target market for Mississauga.
- Mississauga is taking an inclusive approach to welcoming tourists.
- Within the plan's cultural tourism focus, festivals, galleries and other cultural activities are highlighted; and
- The city is using clustering techniques, designing strategic locations with several attractions and retail opportunities that become a travel generator due to the abundance of tourism products in close proximity.

4 Background Research

The following situation analysis for the Destination Antigonish Tourism Strategy outlines the planning context through online research, document reviews, inventories, and tourism activity statistics. The analysis reflects the national, provincial, and local context for tourism strategic planning in support of the Destination Antigonish Tourism Strategy.

4.1 National Context

In 2019, prior to the onset of the pandemic, the Canadian tourism industry experienced a record-breaking year for tourism revenue. This was then immediately followed by the onset of the pandemic, resulting in tremendous losses and challenges for the industry as borders closed and isolation began around the world.

However, despite these significant losses and the continued development of the COVID virus, the Canadian tourism industry has shown promising signs of recovery as travel restrictions are lifted and pent-up demand has begun releasing into the sector.

According to the most recently released Tourism Snapshot by Destination Canada, interest in Canadian tourism has seen spikes even higher than were seen in 2019 across multiple key global markets. Web searches related to Canadian tourism from the US, Europe, and the Asia-Pacific regions have all surpassed their 2019 figures, in particular following the removal of pre-arrival testing.

Tourism spending across Canada reached 72% of its 2019 levels by Q2 of 2022. While international tourism spending has continued to fluctuate at only 38%-40% of its 2019 levels, domestic tourism has recovered to a total of 82% of 2019 figures.

Hotel occupancy has also experienced substantial recovery, with occupancy rates nationwide only 1% less than their 2019 levels. In the cases of small metro areas and towns, hotel occupancy

has seen an increase of 4% over its 2019 levels, likely a result of increased domestic tourism and a growing interest among Canadians to “explore their own backyard.”

Finally, as COVID becomes more controlled and understood, Canadians have begun feeling more comfortable welcoming visitors back into their home regions. As of halfway through 2022, 78% of Canadians were comfortable welcoming Canadians from other parts of the country into their regions, while 59% were comfortable welcoming visitors from the US and other international destinations.¹⁰ These figures show that domestic tourism is particularly important during economic pandemic recovery.

While these trends bode well for Canada’s tourism industry recovery, several overarching issues remain that are expected to dampen the sector’s recovery. These challenges include labour market, economic aspects and business travel considerations.

While the tourism jobs lost across the country during COVID have started reappearing as interest in tourism grows, the industry finds itself in a severe labour shortage. As of Q2 in 2022, Destination Canada reported that just under 150,000 tourism jobs throughout Canada were unfilled, equaling over 8% of all jobs in the tourism sector. Even as tourism rebounds, operators are held back from reaching 2019 levels because they cannot operate at full capacity.

Another factor the Canadian tourism industry is carefully observing is the ongoing war in Ukraine. The global economy is highly dependent on the war ending. Should the conflict continue, oil price volatility will likely exacerbate inflation and limit tourism’s global potential. Volatility in energy and food prices also negatively impact the tourism potential of Canada alongside globally elevated inflation.

As pandemic restrictions are lifted across Canada and elsewhere, the ongoing uncertainty surrounding COVID significantly influences industry trends. Business travel has especially felt the effects of pandemic uncertainty. Global recovery in business travel has been slower than in the leisure sector, with current predictions suggesting global business travel spending will not reach 2019 figures until 2025 or 2026. The slower recovery for business travel has been attributed to the increased use of virtual meeting tools by businesses around the globe and the elevated risk of business trip cancellations.

Other key industry trends influencing the recovery of Canadian tourism include:

- A lack of access to Transportation, both air and ground.
- Higher overall costs for travel
- Product Degradation due to supply chain issues and lower revenue
- Reduced Access to Capital and Limited Liquidity; and
- A shift in the capacity and role of DMOs.

¹⁰ Destination Canada, “[Quarterly Tourism Snapshot Q2 2022.](#)”

Despite these factors, Canada's tourism industry continues on the road to recovery, albeit at uncertain speeds. Destination Canada has predicted that even under a fully realized worst-case scenario, including the Ukraine continuing into 2024 and an onset of a new COVID variant, international tourism to Canada will still likely fully recover by 2026.

As the industry continues to recover, new market trends are expected to influence the industry, including the following¹¹:

- A greater desire for frictionless travel, with increased use of digital technology and smoother travel experiences.
- Increasing domestic travel, as Canadians avoid uncertainty overseas and seek to make up for lost time with friends and family, additionally causing an increase in demand to traditionally less-travelled areas of the country.
- A greater focus on the socio-environmental elements surrounding the impacts of tourism, with increased development in tourist activities with minimal footprints and even environmentally regenerative effects on a destination's culture and economy.
- Further efforts by destinations to promote the well-being and safety of their communities' quality of life in addition to, or even as opposed to, tourism growth.
- A need to further support Indigenous-centered and operated tourism to fully take advantage of a growing demand among domestic and international travellers.
- A surge of travellers looking to experience Canada's natural offerings by visiting nature-based destinations and taking part in nature-based activities as a response to a common sense of confinement following quarantine.
- A growing number of individuals interested in travelling for physical and mental wellness opportunities following the negative impacts on both by the pandemic.
- A buildup of funds among high-spending travellers interested in luxury travel opportunities.
- A surge of travellers who, following the pandemic, have elected to either resign or retire, and who will be using their increased free time to travel more frequently; and
- More travellers who will remain in a destination for a longer-than-average period by continuing to work remotely.

4.2 Nova Scotia Context

Much like Canada as a whole, Nova Scotia's tourism sector has experienced both significant disruption and promising recovery over the past decade.

In 2014, the [Nova Scotia Commission on Building Our New Economy](#) identified tourism as one of several key factors with the potential for growth, challenging the tourism industry to double annual tourism revenues from \$2 billion in 2010 to \$4 billion by 2024. By 2019, Nova Scotia's annual tourism revenue stood at \$2.6 billion. This goal was subsequently abandoned following

¹¹ Destination Canada, "[Tourism's Big Shift](#)"

the onset of the pandemic, with the assumed revenue from the industry in 2020 being approximately \$900 million, a 34% decline compared to the previous year.

Responding to COVID, the province pivoted towards mitigating the operational impacts that tourism businesses were facing due to border restrictions and public health regulations. This included financially supporting tourism businesses and organizations as well as marketing and communications activities to encourage Nova Scotians and fellow Maritimers to travel in the province.

Despite these initial losses, Nova Scotia tourism is showing promising signs of recovery. As of March 2022, Destination Canada was still categorizing nine provinces and territories as within the “Inter-Provincial” phase of their tourism sector recovery. Nova Scotia, however, was among the four provinces and territories considered to have progressed to the “Tentative International” phase of recovery, demonstrating Nova Scotia’s progress in comparison to the rest of the country.

While international tourism still faces challenges, domestic travel in Canada warrants optimism. For example, Nova Scotia topped the Atlantic Provinces as the preferred overnight destination among Canadians and was ranked the 5th most popular province to visit overall, with 8% of Canadian travellers planning a trip to or within Nova Scotia over the course of 2022.

Overall, Nova Scotia is highly regarded by Canadian travellers, with a solid majority of domestic travellers endorsing the province’s many offerings. Some of the most cited attributes include the province’s outdoor appeal, charming towns/communities and its relaxing/leisurely appeal. Concurrently, while Nova Scotians became apprehensive of tourists entering the province during the pandemic, this hesitation has significantly decreased since 2022.¹²

4.2.1 *Visitor Profile*

Nova Scotia welcomed nearly 900k visitors in 2021, an increase of 13% compared to 2020. Although still lower than 2019, the recovery in visitation is cause for optimism. This was reinforced in 2022, when 15% of all visitors planning a trip to Nova Scotia had never done so before, suggesting that more tourists with no history visiting the province are beginning to see it as a potential destination.

Atlantic Canadians comprised 50% of all non-resident visitors to Nova Scotia in 2021. Visitors from Ontario, meanwhile, made up 30% of all non-resident visitors to the province, while visitors from Western Canada represented 10%. Visitors from Quebec comprised 6% of total visitation and US/overseas visitors made up the remaining 4%.

By way of context, over 2.3 million non-resident visitors travelled to Nova Scotia in 2019. This breaks down into:

- Atlantic Canadians: 48%

¹² Destination Canada, “[Resident Sentiment October 2022](#)”

- Ontario: 25%
- Western Canada: 8%
- Quebec: 5%; and
- US and overseas: 14%.

In 2019 over 1.5 million of these visitors entered into Nova Scotia by road while 757k visitors arrived by air. The Caribou Ferry in neighbouring Pictou County was the entry point for 4% of visitors.

Tourism Nova Scotia identifies three priority market segments for the province using the Explorer Quotient Travel Type tool.¹³ These three groups are profiled below:^{14 15 16}

| | Authentic Experiences | Cultural Explorers | Free Spirits |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Traits: | <ul style="list-style-type: none"> • Spontaneous • Discrete • Ethical • Eco-Conscious • Independent • Open-Minded • Curious | <ul style="list-style-type: none"> • Positive • Open-Minded • Curious • Risk-Taker • Flexible • Easy-Going • Energetic • Creative | <ul style="list-style-type: none"> • Open-Minded • Ambitious • Enthusiastic • Fun-Loving • Adventurous • Curious • Social |
| Ideal Attractions: | <ul style="list-style-type: none"> • Nature Reserves • World Heritage Sites • Hiking Trails • Museums • Homestays • Campsites | <ul style="list-style-type: none"> • Heritage Sites • Cultural Events • Museums • Festivals • B&Bs • Hostels | <ul style="list-style-type: none"> • Luxury Hotels • Tourism Hot Spots • Top Restaurants • Night Clubs • Group Tours |
| Travel Values: | <ul style="list-style-type: none"> • Learning about places, times, and cultures • Enjoying vast Natural Settings and Wonders • Prefer integrating into the local culture • Personal Development | <ul style="list-style-type: none"> • Prefers travelling with like-minded people • Enjoying ancient history and modern culture • Learning about places, times, and cultures • Always planning for their next trip | <ul style="list-style-type: none"> • Enjoys experiencing a bit of everything • Always planning for their next trip • Prefers travelling with like-minded people • Seeks the best they can afford |

¹³ Tourism Nova Scotia, "[Traveller Segmentation](#)"

¹⁴ "[Traveler Type: Authentic Experiencer](#)"

¹⁵ "[Traveler Type: Cultural Explorer](#)"

¹⁶ "[Traveler Type: Free Spirit](#)"

4.2.2 Tourism Trends

Room sales across Nova Scotia followed a similar path of recovery, with sales dropping significantly across the province with the onset of the pandemic while seeing significant growth and renewal as of 2022 (Figure 4).

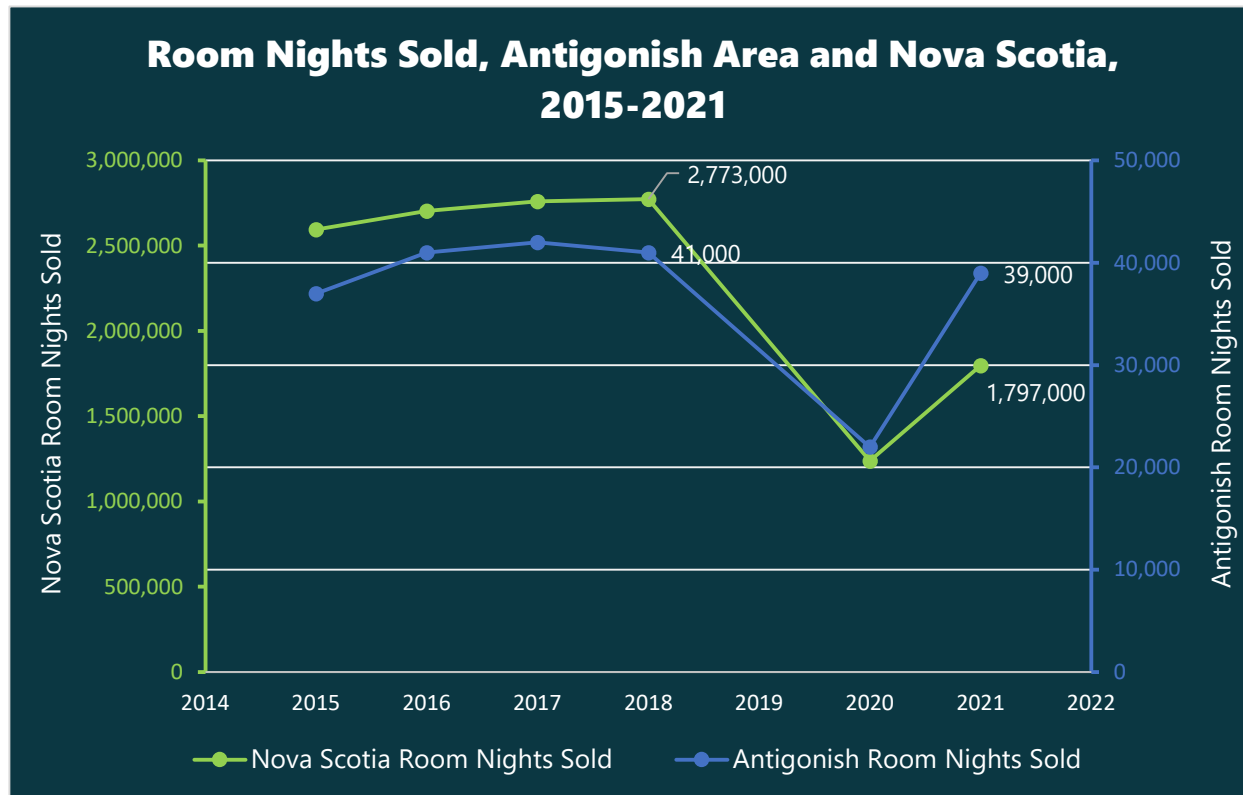


Figure 4: Number of Overnight Rooms Sold for both Antigonish County and Nova Scotia, 2015-2021

While room sales figures have yet to return to their pre-pandemic levels, the sharp increase in 2021 suggests promising recovery moving forward. Although province-wide room nights sold were down a third (34%) compared to 2019, about 1.8 million rooms were sold in 2021 - an increase of 45% compared to 2020.

Despite the sector’s promising recovery, several challenges remain for Nova Scotia attracting Canadian travellers. As of 2022, Canadian tourists perceived the cost of travel to Nova Scotia as high (34%), the distance being too great (25%) and one in five (20%) noted a lack of familiarity with Atlantic Canada.¹⁷

¹⁷ Tourism Nova Scotia, “Atlantic Canada 2022 Travel Study”

4.3 Antigonish Context

Room night sales in Antigonish County provide insights into the scale of tourism and related trends and how it compares to the rest of the province (Figures 5 and 6).

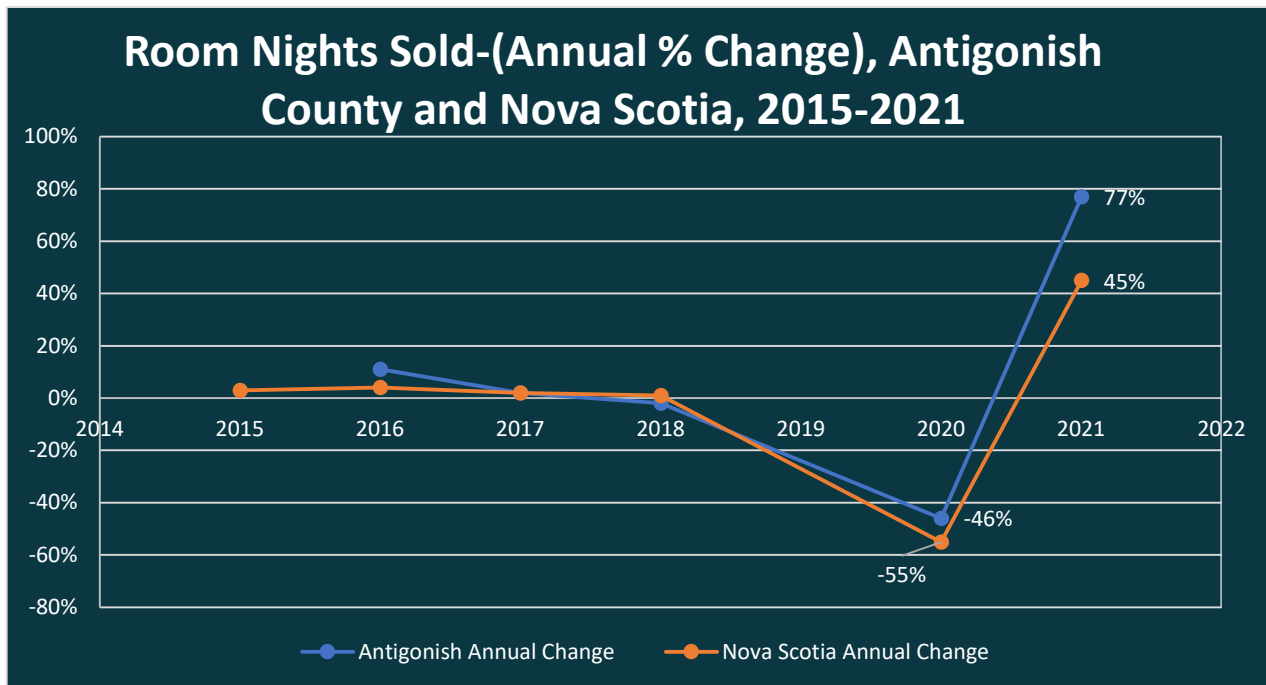


Figure 5: Annual % change of Room Nights Sold for both Antigonish County and Nova Scotia

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| Year | Antigonish Room Nights Sold | Antigonish Annual Change | Nova Scotia Room Nights Sold | Nova Scotia Annual Change | Nova Scotia (Outside of Halifax) Room Nights | Nova Scotia (Outside of Halifax) Annual Change |
|------|-----------------------------|--------------------------|------------------------------|---------------------------|----------------------------------------------|------------------------------------------------|
| 2015 | 37,000 | N/A | 2,594,000 | 3% | 1,166,000 | 2% |
| 2016 | 41,000 | 11% | 2,704,000 | 4% | 1,244,000 | 7% |
| 2017 | 42,000 | 2% | 2,760,000 | 2% | 1,311,000 | 6% |
| 2018 | 41,000 | -2% | 2,773,000 | 1% | 1,281,000 | -2% |
| 2020 | 22,000 | -46% | 1,239,000 | -55% | 612,000 | -50% |
| 2021 | 39,000 | 77% | 1,797,000 | 45% | 894,000 | 46% |

Figure 6: Annual Overnight Rooms Sold for Antigonish County, Nova Scotia, and Nova Scotia Outside HRM

Antigonish room sales generally followed the same trends as the rest of the province up until the onset of the pandemic. As can be seen in 2020 room sales data, while Antigonish experienced a significant loss compared to pre-pandemic figures, this loss was less severe than was experienced by Nova Scotia as a whole. Antigonish managed to maintain over 50% of their pre-COVID room sales.

This trend continued into the pandemic recovery phase. Although both Antigonish and Nova Scotia experienced significant recovery compared to 2020, Antigonish posted a significantly larger relative increase in rooms sold compared to the provincial average.