



# FUNDY DISCOVERY SITE

## INTERPRETIVE CONCEPT & FEASIBILITY STUDY

*December 2020*

### Volume 2: Feasibility Study



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# 1. INTRODUCTION

The Project Steering Committee for the Fundy Discovery Site is interested in exploring the development of an Interpretive Centre for the Fundy Discovery Site in Lower Truro, NS. The desired Site will emphasize visitor experience and the interpretation of cultural and natural heritage for the site, along with programmatic and social themes making it an exciting and memorable place to visit for both tourists and local residents.

AldrichPears Associates (APA), Architecture49, A.L. Arbic Consulting, and Group ATN have been engaged to conduct a feasibility study to:

- » Educate and inform residents and visitors about the significance of the Fundy tidal phenomena and its influence on the site, settlement patterns, land uses and economic activities.
- » Highlight, communicate and help preserve regional and site-specific stories that speak to heritage, cultural, interface (Indigenous, Acadian, Planters, etc.), natural history and the Bay of Fundy Region.
- » Complement and strengthen existing site amenities and projects.
- » Help promote the Bay of Fundy Region and its associated visitor attractions; and
- » Support and build upon initiatives associated with the UNESCO Cliffs of Fundy Geopark.

As an important component of the business plan, this benchmark report examines six case studies of analogue interpretive centres to draw upon best practices and provide examples that a Fundy Discovery Site could emulate.

## 1.1 Interpretive Centres

Interpretive centres are typically located near places of interest and offer interpretive information relating to the region they serve<sup>1</sup>. This information may be communicated through a variety of media including exhibitions, animation, photographs and videos. While similar to museums, these centres are distinctive by their close link to their physical site, educating visitors based on cultural and natural evidence in their original context<sup>2</sup>.

Group ATN (GATN) has examined interpretive centre cases across Canada, with a particular focus on the Bay of Fundy, to provide insights on structures and services offered to support planning for the Fundy Discovery Site and Interpretive Centre. The following analogues were selected:

- » The Train Station Bike and Bean, Nova Scotia
- » Fundy Ocean Research Centre for Energy, Nova Scotia
- » Fundy Tidal Interpretive Centre, Nova Scotia
- » Cape Enrage, New Brunswick
- » Fundy Trail Parkway, New Brunswick; and
- » Riverbank Discovery Centre, Manitoba

1 <https://www.collinsdictionary.com/dictionary/english/interpretive-centre>  
2 [https://www.diba.cat/c/document\\_library/get\\_file?uuid=63952a92-928c-4eb9-a698-587bea5cf637&groupId=99058](https://www.diba.cat/c/document_library/get_file?uuid=63952a92-928c-4eb9-a698-587bea5cf637&groupId=99058)

## 2. PLANNING CONTEXT

The “life-blood” of a contemporary tourism destination is a robust mix of natural, cultural, historic, and Indigenous experiences. The Bay of Fundy generally and the Fundy Discovery Site specifically, ticks all these boxes.

The Bay of Fundy is one of Canada’s top natural tourism icons, attracting visitors from around the world. The region is a compelling mix of geological, indigenous, historical, cultural and ocean features. The Discovery Site would be a valuable addition to the existing Bay of Fundy tourism cluster – a geographic concentration of complementary attractions and experiences. The region is achieving a critical mass that enables it to stand on its own as a signature attraction and travel generator. Beyond the significant attractions profiled in the above Case Study analysis, the Bay of Fundy region features complimentary attractions such as Mi’kmaq legends, earliest settlements, wildlife viewing, dining on the ocean floor, the highest tides in the world and award-winning wineries.

Planning for the Discovery Site recognizes the importance of the concept of place as a catalyst for economic and social development. Creating a place for residents is at the heart of place making. At its most basic, a place is a space or location that has meaning for people. The stronger the meaning, the better the place. The Site provides another way for visitors to experience both the local area and the Bay of Fundy. Placemaking best practices build places for locals first. Building for locals first is a draw for a high value tourist who is looking for authentic experiences. These places attract tourists to visit, stay longer, and spend more money.

The importance of the Atlantic Growth Strategy is amplified for the Site given the prominence of the Bay of Fundy region for both Nova Scotia and New Brunswick. The Strategy highlights the federal commitment to tourism with a recommendation to increase support for experiential tourism in Atlantic Canada including a new multi-year initiative to develop Indigenous experiential tourism based on authentic cultural practices and skills.

Tourism Nova Scotia’s strategy is focused on four pillars:

- » Attract First-time Visitors
- » Invest in Markets of Highest Return
- » Focus on World Class Experiences; and
- » Build Tourism Confidence.

Notably, Tourism Nova Scotia introduced the Tourism Revitalization of Icons Program. Through this program, the provincial government pledged to invest \$6 million to enhance five iconic tourism sites – including the Bay of Fundy. This affirms the Bay of Fundy’s prominence in the Nova Scotia’s tourism brand, while recognizing the opportunity to use its power to leverage visitor spending opportunities.

A key feature of province’s marketing strategy is founded on the Explorer Quotient (EQ). This builds on traditional segmentation criteria by incorporating psychographics - people’s social values and world views - to better understand what drives a person’s travel selection and purchasing decisions. Tourism Nova Scotia began using EQ as their lead market segmentation tool in 2015. EQ helps to identify who is most drawn to the province’s unique landscapes, cultures, and experiences, while tailoring marketing approach to appeal to these potential visitors. The three EQ types that offer the best fit with what Nova Scotia has to offer as a tourism destination are:

- » Authentic Experiencers
- » Cultural Explorers; and
- » Free Spirits

Authentic Experiencers<sup>1</sup> value both natural and cultural environments. They seek to be fully immersed in their travel experience, avoiding group tours and rigid plans. Authentic Experiencers are ethical, eco-conscious and open-minded, among other characteristics. This segment is attracted to museums. The proposed features of the Fundy Discovery Site resonate with their values of learning, cultural immersion, and personal development.

Cultural Explorers<sup>2</sup> constantly seek opportunities to embrace, discover, and immerse themselves in the entire experience of the culture, people, and settings of the places they visit. They visit museums and are also keen to participate in the modern-day culture as well. Cultural Explorers are open-minded, curious risk-takers among other characteristics. The proposed features of the Fundy Discovery Site resonate with their values of living history/culture, learning and exploring.

1 <https://quiz.canada.travel/caen/traveller-types/ttAE>

2 <https://quiz.canada.travel/caen/traveller-types/ttCE>

Free Spirits<sup>3</sup> are energetic travelers seeking to sample high quality experiences. Their affinity for high profile consumption does not align with the Discovery Site as well as the other two priority segments, but there may be experiences that could be developed for the Free Spirits in the longer term.

The Site’s rich Mi’kmaq connections will be extremely relevant in a tourism context. Research conducted by the Indigenous Tourism Association of Canada (ITAC) and the Conference Board of Canada highlight the potential of First Nation tourism to further contribute to Indigenous economic and social inclusion, while strengthening cultural identity. ITAC’s recent national study highlights the gap between the supply and demand for Indigenous product and services in Canada. Leveraging this pent-up demand for tourism experiences is an important opportunity for Indigenous Communities, entrepreneurs, and social enterprises.

The UN World Tourism Organization highlights the important opportunity and potential benefits of Indigenous tourism : “If managed responsibly and sustainably, Indigenous tourism spurs cultural interaction and revival, bolsters employment, alleviates poverty, curbs rural flight migration, empowers local communities, especially women and youth, encourages tourism product diversification, allows people to retain their relationship with the land and nurtures a sense of pride.”<sup>4</sup>

Other visitor research profiled in the following sections confirms the important place the Site would have for visitors. Going forward, the impact of the UNESCO designated Cliffs of Fundy Geopark has the potential to significantly impact the visitation realized at the site.

3 <https://quiz.canada.travel/caen/traveller-types/ttFS>

4 Recommendations on Sustainable Development of Indigenous Tourism – 2019  
<https://www.e-unwto.org/doi/book/10.18111/9789284421299>



2.1 Colchester County

Colchester County was home to 50,585 Nova Scotians as of 2016 and has seen a fairly stable population since 2011 with a slight 0.8% decrease<sup>1</sup>. The county’s median age is slightly higher than the national average standing at 46.6 years old compared to 45.5 years old. Six out of ten residents are married or living in common law with an average family size of 2.7.

The region has an employment rate of 54.4% and an average total household income of \$68,463, lower than the provincial average which stands at \$76,797. The main occupation in the region relates to sales and service occupation followed by trade, transport and equipment operators and related occupations; and retail trade and manufacturing are the two strongest industries in the region.

Half of individuals aged 15 or more have obtained a postsecondary certificate, diploma or degree, a slightly lower rate compared to Province which stands at 55%. Of those pursuing a post-secondary education, architecture, engineering, and related technologies and business, management and public administration are the leading fields.



1 <https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/details/page.cfm?Lang=E&Geo1=CD&Code1=1210&Geo2=PR&Code2=12&SearchText=Colchester&SearchType=Begin&SearchPR=01&B1=All&GeoLevel=PR&GeoCode=1210&TABID=1&type=0>

2.2 Key Findings of Public and Stakeholder Engagement

In 2017 UPLAND | Planning + Design led public and stakeholder engagement for what was then called the Fundy Gateway. Activities were hosted over a three-week period between April 25th and May 20th. Public engagement activities included public meetings which welcomed over 70 attendees and an online survey which generated over 250 responses. Stakeholder engagement was conducted through 45 key informant interviews and focus groups which collectively engaged over 75 stakeholders from tourism related areas including arts, history, parks, recreation, natural science interpretation, transportation, economic development, and the local Acadian and Mi'kmaq communities.

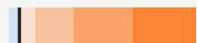

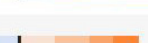
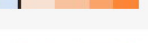
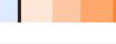
Strong support in the community for this project emerged from these sessions. The strategic position of the site makes it ideal for both a destination and referral center, notably presenting an opportunity to promote other regions of the province.

Participants noted that the site should be accessible to all and feature activities of interest to all age groups, as well as activities ranging from purely recreational to educational. Educational activities may include programs from school groups and interpretive sessions or tours, while recreational activities may include playgrounds and outdoor activities such as cycling. The latter would require the development of amenities and presents the opportunity for guided tours and bike rental facilities. **Tables 1 and 2** outline the preferred activities and facilities for the site.

Table 1: Preferred activities for the Fundy Discovery Site Experience

| WHAT VISITOR ACTIVITIES SHOULD BE OFFERED? |                                     |   |  |       |                         |
|--|-------------------------------------|---|--|-------|-------------------------|
| Rank                                       | Item                                | Rank Distribution   |  | Score | Score Total Respondents |
| Overall Rank                               | Item                                | Rank Distribution   |  | Score | Respondents             |
| 1  | Watching the tidal bore             |    |  | 774   | 204                     |
| 2  | Dining                              |    |  | 406   | 132                     |
| 3  | Relaxing                            |    |  | 325   | 108                     |
| 4  | Exhibits                            |    |  | 312   | 103                     |
| 5  | Bicycling                           |    |  | 269   | 95                      |
| 6  | Kayaking, canoeing, paddle boarding |    |  | 249   | 88                      |
| 7  | Tidal bore rafting                  |    |  | 239   | 72                      |
| 8  | Live music                          |    |  | 211   | 71                      |
| 9  | Stargazing                          |  |  | 195   | 73                      |
| 10   | Organized programs and activities   |  |  | 193   | 71                      |

Table 2: Preferred facilities for the Fundy Discovery Site Experience

| WHAT VISITOR SERVICES OR AMENITIES WOULD BE MOST IMPORTANT? |                     |   |  |       |     |
|---|---------------------|---|--|-------|-----|
| Rank  | Item                | Rank Distribution   |  | Score |     |
| 1   | Bathrooms           |  |  | 925   | 245 |
| 2   | Tourism information |  |  | 806   | 228 |
| 3   | Rest areas          |  |  | 566   | 194 |
| 4   | Drinking water      |  |  | 504   | 170 |
| 5   | Wifi                |  |  | 327   | 115 |



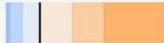

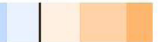

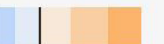

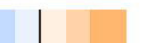









The tidal bore was widely viewed as the primary feature of the site (**Table 3**). While interpretive information is readily available across the region, birds congregate here during spring and fall migration, and waterfowl move to/from the river with the changing tide. In addition to this unique aspect of bird watching and the tidal bore, sunsets were identified as the most valuable assets of the site.

The Bay of Fundy region is also viewed as offering the opportunity to emphasize the history and culture of Acadian and Mi'kmaw people. Participants highlighted the importance of including all cultures if cultural interpretation was featured on the site.

The site is already used as a picnic area. Additional opportunities for food vendors offering a variety of local foods at various price points were noted.

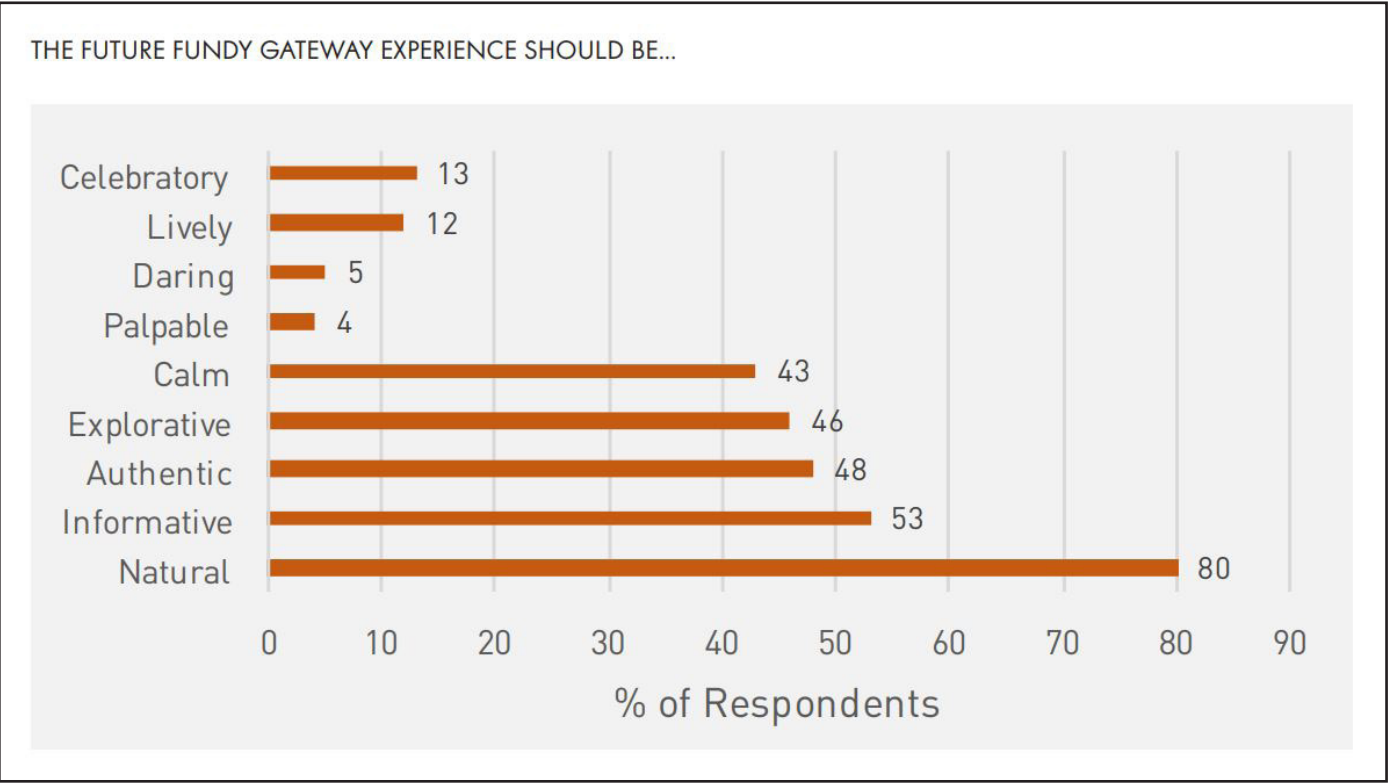
Table 3: Description of the Aspired Fundy Discovery Site

| WHAT EXISTING SITE FEATURES ARE THE MOST VALUABLE TO YOU?                            |                          |  |     |       | WHAT ARCHITECTURAL FEATURES ARE MOST DESIRABLE?                                       |                            |   |       |                   |
|--|--------------------------|--|-----|-------|---|----------------------------|---|-------|-------------------|
| Rank   | Item                     | Rank Distribution  |     | Score | Rank  | Item                       | Rank Distribution   |       | Score             |
| 1  | Tidal bore               |  | 878 | 218   | Overall Rank  | Item                       | Rank Distribution   | Score | Total Respondents |
| 2  | View of the bay          |  | 691 | 202   | 1   | Waterside boardwalk        |  | 1,099 | 238               |
| 3  | Sunsets                  |  | 429 | 143   | 2   | Viewing platform           |  | 966   | 235               |
| 4  | Quiet and stillness      |  | 351 | 118   | 3   | Pedestrian bridge          |  | 911   | 230               |
| 5  | Historic significance    |  | 320 | 116   | 4   | Visitor centre building(s) |  | 833   | 221               |
| 6  | Birds and other wildlife |  | 289 | 119   | 5   | Viewing tower              |  | 671   | 210               |
| 7  | Dyke lands               |  | 279 | 108   | 6   | Outdoor performance space  |  | 527   | 197               |
| 8  | Access road              |  | 99  | 40    |  |                            |   |       |                   |
|  |                          |  |     |       |   |                            |   |       |                   |

An overall modest use of the site was favored while maintaining a peaceful and calm atmosphere (**Table 4**).

Although discussions were generally positive, some concerns emerged including the fear of a negative impact on a smaller visitor destination, and the loss of the current ambiance and restricted access to the site. Additionally, flood plains and storm surges were identified as potential challenges in developing the site.

Table 4: Description of the Aspired Fundy Discovery Site Experience







2.3 Contextual Cases

Centres offering similar services to those considered for the Fundy Discovery Site were reviewed to gather insights on services being offered in the Bay of Fundy region, as well as information on programming and financial details. A profile and analysis of three related interpretive centers located along the Bay of Fundy was prepared. Service-oriented aspects of these operations were reviewed including support to earned revenues and financial sustainability, and partnerships and engagement with local businesses. This exercise focused on concept, governance, services, seasonality, mission and partnerships. Contextual cases examined were:

- » Fundy Tidal Interpretive Centre
- » Fundy Ocean Research Centre for Energy (FORCE); and
- » Fundy Trail Parkway

2.3.1 Fundy Tidal Interpretive Centre

The Fundy Tidal Interpretive Centre is located in South Maitland, Nova Scotia, near the Shubenacadie River. The Centre teaches visitors about the history of the region and the science of the world’s highest recorded tides. A range of services, programs and infrastructure were developed collaboratively, including:

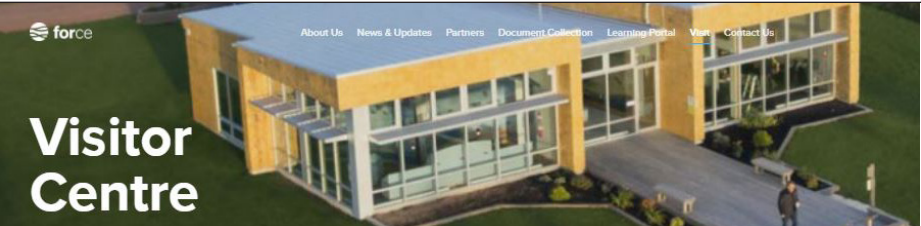
- » Tidal observation deck and park
- » Interpretative exhibits
- » Interpretive talks and guided tours
- » Ducks Unlimited Marsh Program
- » Walking trail network; and
- » Bird and eagle watching

The Fundy Tidal Interpretive Centre has a partnership with Fundy Tidal Bore Adventures, where they promote each other’s offerings. The Fundy Tidal Bore Adventures focuses on the recreational aspect, offering experiences such as rafting and mud sliding for fees of \$60 to \$85 per adult.

The Interpretive Centre is managed by the Municipality of East Hants and operates seasonally, from mid-May to mid-October.

Table 5: Fundy Tidal Interpretive Centre Key Information

|              |   |
|--------------|---|
| Concept      | Interpretive centre where individuals learn about the history of the region and its tides through educational programs, guided tours and exhibits.  |
| Mission      | To share the history of the region and the science of the world’s highest recorded tides.   |
| Services     | <ul style="list-style-type: none"><li>○ Tidal observation deck and park</li><li>○ Interpretative exhibits</li><li>○ Interpretive talks and guided tours</li><li>○ Tidal observation deck</li><li>○ Ducks Unlimited Marsh Program</li><li>○ Walking trail network; and</li><li>○ Bird and eagle watching</li></ul> |
| Season       | May 17 <sup>th</sup> to October 14 <sup>th</sup>  |
| Governance   | Municipal   |
| Partnerships | Fundy Tidal Bore Adventures   |



2.3.2 Fundy Ocean Research Centre for Energy (FORCE)

The Fundy Ocean Research Centre for Energy (FORCE) is located near Parrsboro, Nova Scotia, near the Minas Passage of the Bay of Fundy. The Centre serves as an interpretative centre and research facility for tidal stream technologies. FORCE is a leading research facility for tidal stream technology, while working to better understand whether this technology can play a safe and effective role in Canada’s energy future. The Centre promotes innovation and development by lowering barriers to experimentation, demonstration, monitoring and analysis of tidal energy generation.

Two service streams are offered with one tailored to the general public and the other to the private sector. General public admission is free, and includes the following:

- » Interpretive exhibits
- » Interactive displays
- » Small theatre and community room; and
- » Space for onsite meetings and research work

Offerings for the private sector relate to turbine development; allowing companies to test their equipment by providing:

- » A permitted site
- » Electrical infrastructure
- » Observation facility; and
- » Connection to the power grid

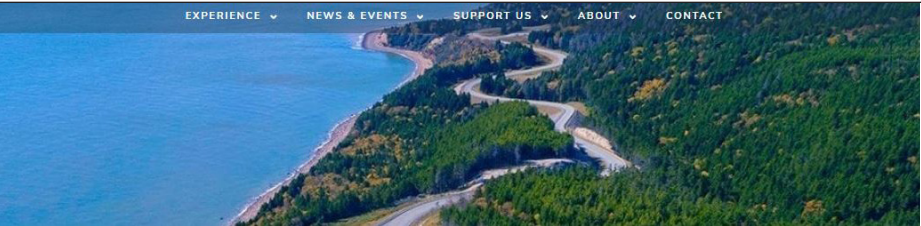
FORCE operates as a private not-for-profit company. The centre is managed by a board of directors, which also receives input from an independent Environmental Monitoring Advisory Committee and a Community Liaison Committee. The interpretive centre operates seasonally from mid-May to mid-October.

FORCE has over 20 partnerships to further advance their mission. These include partnerships with local communities, environmentalists, fishers, First Nations, regulators, the scientific community, marine service industry, the tourism sector, universities, utility providers, manufacturers, tidal stream energy developers and the Province of Nova Scotia.

Table 6: FORCE Key Information

|              |  |
|--------------|--|
| Concept      | Interpretative centre which includes a research facility for tidal stream technologies.  |
| Mission      | To better understand if tidal stream technologies can play a safe and effective role in Canada’s energy future.  |
| Services     | General public offerings: <ul style="list-style-type: none"><li>○ Interpretive exhibits</li><li>○ Interactive displays</li><li>○ Small theatre and community room; and</li><li>○ Space for onsite meetings and research work</li></ul> Private sector offerings: <ul style="list-style-type: none"><li>○ Permitted site</li><li>○ Electrical infrastructure</li><li>○ Observation facility; and</li><li>○ Connection to the power grid</li></ul> |
| Season       | May 15 <sup>th</sup> to October 15 <sup>th</sup>   |
| Governance   | <ul style="list-style-type: none"><li>○ Private not-for-profit company</li><li>○ Board of directors</li><li>○ Independent Environmental Monitoring Advisory Committee; and</li><li>○ Independent Community Liaison Committee</li></ul>   |
| Partnerships | <ul style="list-style-type: none"><li>○ Local communities</li><li>○ Environmentalists</li><li>○ Fishers</li><li>○ First Nations</li><li>○ Regulators</li><li>○ Scientific community</li><li>○ Marine service industry</li><li>○ Tourism sector</li><li>○ Universities</li><li>○ Utility providers</li><li>○ Manufacturers</li><li>○ Tidal stream energy developers; and</li><li>○ Province of Nova Scotia</li></ul>                              |





2.3.3 Fundy Trail Parkway

The Fundy Trail Parkway is located in St. Martins, New Brunswick, on the coast of the Bay of Fundy. The interpretive centre is housed in a re-creation of a bunkhouse and educates visitors on the original settlers of the area through interpretive displays, historic artifacts and guided services delivered by staff. An admission fee of \$9.50 enables visitors to access a wide range of services, natural features and observation areas including:

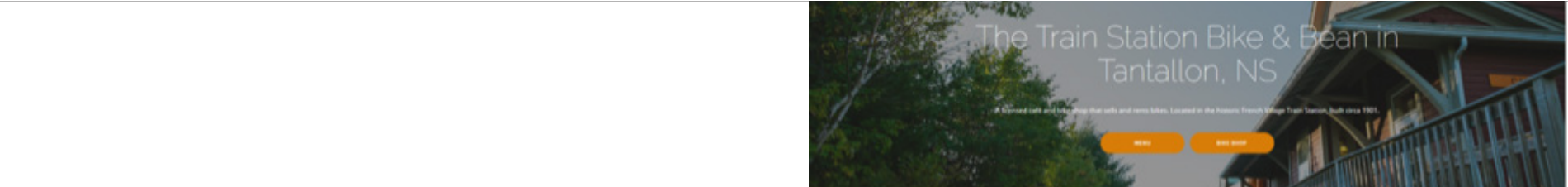
- » Daily talks (additional fees)
- » Exhibitions displaying original artifacts and old photographs
- » Gift and souvenir shop
- » Snacks bar
- » Multi-use hiking trails: hiking, walking and biking
- » Observation decks
- » Lookouts
- » Suspension bridges
- » Waterfalls
- » Beaches
- » Green areas for picnics
- » James Catt Monument
- » Sea Captains’ Burial Ground
- » McCumbers Brook Wetlands
- » Flowerpot Rock; and
- » Lumbering Days site, including:
  - ♦ *Cookhouse: heritage building with historic pictures of original settlers logging and forest harvesting*
  - ♦ *Heritage sawmill display including tools*
  - ♦ *School foundation*

The Fundy Trail Parkway operates as a charitable not-for-profit, managed by a volunteer board of directors appointed by the New Brunswick Minister of Tourism, Culture and Heritage on three-year terms. The site is open seasonally, from mid-May to mid-October.

The table at right summarizes key points drawn from this case study:

Table 7: Fundy Trail Parkway Key Information

|               |  |
|---------------|--|
| Concept       | Interpretative centre educating visitors on the original settlers of the area.   |
| Mission       | To tell the story of the area’s history.   |
| Services      | <ul style="list-style-type: none"><li>○ Daily talks</li><li>○ Exhibitions displaying original artifacts and old photographs</li><li>○ Gift and souvenir shop</li><li>○ Snack bar</li><li>○ Multi-use hiking trails</li><li>○ Observation decks</li><li>○ Lookouts</li><li>○ Suspension bridges</li><li>○ Waterfalls</li><li>○ Beaches</li><li>○ Green areas</li><li>○ James Catt Monument</li><li>○ Sea Captains’ Burial Ground</li><li>○ McCumbers Brook Wetlands</li><li>○ Flowerpot Rock; and</li><li>○ Lumbering Days Site, including:<ul style="list-style-type: none"><li>- Cookhouse</li><li>- Heritage sawmill display</li><li>- School foundation</li></ul></li></ul> |
| Season        | May 15 <sup>th</sup> to October 17 <sup>th</sup>   |
| Governance    | <ul style="list-style-type: none"><li>○ Charitable not-for-profit managed; and</li><li>○ Volunteer board of directors</li></ul>  |
| Partnershiops | Unavailable  |



2.4 Comparable Cases

Comparable operations found across Canada were reviewed to gain insight on service-oriented aspects of the operations. This work builds on previous reviews conducted by Upland - Grenfell Interpretation Centre at Grenfell Historic Properties in Newfoundland and Labrador, and the Vancouver Island Visitor Centre, Comox Valley in British Columbia. Building on these case studies, GATN undertook a review of three comparable operations. The case study focus was on operational sustainability rather than interpretation, with a broad view of the site and what could be accommodated in terms of use and activity. The three comparable operations examined were:

- » The Train Station Bike and Bean, NS
- » Cape Enrage, NB; and
- » Riverbank Discovery Centre, MB

Similar to the contextual analogues, comparable cases were reviewed to gain insights on additional support to earned revenues and financial sustainability, and partnerships and engagement with local businesses. A summary of findings from these case studies is provided in the proceeding sections.

2.4.1 The Train Station Bike and Bean

The Train Station Bike and Bean is a café and shop located in St. Margaret’s Bay, Nova Scotia, adjacent to the Rum Runners Trail - a multi-use Rails-to-Trails pathway that runs between Halifax and Lunenburg. The Bike and Bean’s mission is to help visitors experience and enjoy the trail. Bike and Bean services include:

- » Café
- » Bike shop and rental
- » Snowshoe rental
- » Outdoor equipment and clothing shop; and
- » Access to multi-use trail

The Bike and Bean is privately owned by Dan Flinn and operates year-round as activities such as cross-country skiing and snowshoeing attract visitors during winter months. The operation has also partnered with a dozen clothing and outdoor gear brands, which are available in the shop.

Table 8: The Bike and Bean Key Information

|              |   |
|--------------|---|
| Concept      | Café and shop offering bike and snowshoe rentals to individuals exploring the region.   |
| Mission      | To help visitors experience and enjoy the Rum Runners Trail.  |
| Services     | <ul style="list-style-type: none"><li>○ Café</li><li>○ Bike rental</li><li>○ Snowshoe rental</li><li>○ Outdoor equipment and clothing shop; and</li><li>○ Access to multi-use trail</li></ul> |
| Seasonal     | Year-round  |
| Governance   | Private   |
| Partnerships | Dozen clothing and outdoor gear brands  |





2.4.2 Cape Enrage

Cape Enrage is located in Waterside, New Brunswick, near Chignecto Bay. The operation provides visitors with an enriching and entertaining Bay of Fundy experience. The facility is funded through admission fees and donations. A wide range of recreational and educational services are available on site with a \$6 admission fee. These services include:

- » Restaurant
- » Meeting and conference facilities
- » Beaches
- » Lighthouse
- » Shipwreck
- » Geology and fossil exploration
- » Gallery and gift shop
- » Ziplining (additional fees); and
- » Rappelling (additional fees)

A range of group activities suitable for school groups are also available including:

- » Obstacle courses
- » Adventures Initiative Games; and
- » High School Challenge: a four-day adventure in a remote wilderness venue which includes activities such as kayaking, rappelling, climbing, wilderness camping, and more

Cape Enrage has partnered with local experience providers such as the Broadleaf Guest Ranch, Baymount Outdoor Adventures and FreshAir Adventures. These partnerships allow visitors booking group activities to customize their experiences by packaging adventures with activities from these partners.

Additional partnerships with local farmers and fishermen enable Cape Enrage to offer fresh and local foods at the restaurant.

Cape Enrage operates as a charity not-for-profit organization managed by a volunteer board of directors. The operation is open seasonally, from mid-May to mid-October.

Table 9: Cape Enrage Key Information

|              |   |
|--------------|---|
| Concept      | Cape Enrage offers various recreational and educational services.   |
| Mission      | To provide guests with an enriching and entertaining Bay of Fundy experience.   |
| Services     | <p>Facilities and points of interest:</p> <ul style="list-style-type: none"><li>○ Restaurant</li><li>○ Meeting and conference facilities</li><li>○ Beaches</li><li>○ Lighthouse</li><li>○ Shipwreck</li><li>○ Geology and fossil exploration</li><li>○ Gallery and gift shop</li><li>○ Ziplining; and</li><li>○ Rappelling</li></ul> <p>Group activities:</p> <ul style="list-style-type: none"><li>○ Obstacle courses</li><li>○ Adventures Initiative Games; and</li><li>○ High School Challenge</li></ul> <p>Group activities are customizable and may be coupled with activities from partner organizations.</p> |
| Seasonal     | Mid-May to mid-October  |
| Governance   | <ul style="list-style-type: none"><li>○ Charity not-for-profit organization; and</li><li>○ Volunteer board of directors</li></ul>   |
| Partnerships | <ul style="list-style-type: none"><li>○ Broadleaf Guest Ranch</li><li>○ Baymount Outdoor Adventures</li><li>○ FreshAir Adventures; and</li><li>○ Local farmers and fishermen</li></ul>  |



2.4.3 Riverbank Discovery Centre

The Riverbank Discovery Centre is located in Brandon, Manitoba, near the Assiniboine River Corridor. The Centre offers travel and interpretive information on the Assiniboine River to create a gathering place, while connecting people with nature. A range of services are available including:

- » Travel information
- » Gift and souvenirs shop
- » Interpretive information about the Assiniboine River Corridor
- » Wildlife displays
- » Packages for events and conventions
- » Tourist Greeter Program
- » Self-guided tours (brochures and maps)
- » Interpretive programs for school and tour groups
- » Summer Swamp Camps: for children aged 5-9; and
- » Outdoor festival space (coming soon)

The Riverbank Discovery Centre is managed by the Brandon Riverbank Inc., a charitable not-for-profit organization with a mission to develop the Assiniboine River Corridor. The Centre operates year-round.

The Centre has partnerships with local crafters, allowing locally made goods to be sold at the Centre’s shop.

Table 10: Riverbank Discovery Centre Key Information

|              |   |
|--------------|---|
| Concept      | Centre offering travel and interpretive information on the Assiniboine River Corridor.  |
| Mission      | To develop the Assiniboine River Corridor to be a gathering place connecting people with nature.  |
| Services     | <ul style="list-style-type: none"><li>○ Travel information</li><li>○ Gift and souvenirs shop</li><li>○ Interpretive information about the Assiniboine River Corridor</li><li>○ Wildlife displays</li><li>○ Packages for events and conventions</li><li>○ Tourist Greeter Program</li><li>○ Self-guided tours (brochures and maps)</li><li>○ Interpretive programs for school and tour groups</li><li>○ Summer Swamp Camps; and</li><li>○ Outdoor festival space (coming soon)</li></ul> |
| Seasonal     | Open year-round   |
| Governance   | <ul style="list-style-type: none"><li>○ Charitable not-for-profit organization; and</li><li>○ Managed by the Brandon Riverbank Inc.</li></ul>   |
| Partnerships | Local crafters  |



## 2.5 Case Study Conclusions

The main takeaways are presented below.

### Mission

The analogues examined typically have an educational mission, with a main goal to educate visitors about the history and the natural features of the region, and in some cases, the promotion of a healthy and active lifestyle.

### Services

Centres typically offer interpretive exhibitions developed based on the region’s history and natural features; and in certain instances, were paired with government funded research institutes. Services offered include:

- » Guided interpretive tours where individuals learn about the region’s history and natural features; and educational programs developed for schools and tour groups. The centres may be used as an information centre and meeting point for these tours and programs.
- » Indoor and outdoor space for events and conferences are typically made available, offering an additional revenue stream. To accommodate meetings and conferences, centres must also provide wireless internet access, projectors, sound systems, white boards, and more.
- » These centres typically include souvenir shops, restaurants or snack bars, with green space for picnics, trail networks, observation decks and more.
- » When located near multi-use trails, bike and gear rentals are available on site.
- » Additional services include summer camps, recreational activities such as ziplining, mountain climbing, repelling, rafting and more.

### Seasonality

Analogues located in the Fundy area are open to the public seasonally, with seasons generally beginning on Victoria Day weekend (mid-May) and ending in mid-October. The Train Station Bike and Bean and the Riverbank Discovery Centre both operate year-round as permitted by weather conditions and traffic flow. Notably, the Bike and Bean has managed to capitalize on winter tourism by offering snowshoe rental, allowing visitors to explore the trail network during winter months.

### Governance

With the exception of the Bike and Bean and the Fundy Tidal Interpretive Centre, analogues were run as charitable not-for-profit organizations managed by a volunteer board of directors.

### Partnerships

Two types of partnerships were identified. In the case of the Bike and Bean, Cape Enrage and the Riverbank Discovery Centre, partnerships are made with local farmers and businesses to offer local goods at the site’s gift shops. Partnerships with local farmers, fishers, and food processors enabled the attraction to offer fresh and local foods at its restaurant or café.

In the case of Cape Enrage and Fundy Tidal Interpretive Centre, partnerships with other centres and experience providers enabled them to offer customizable experiences and mutually increase visibility. This potentially offers the added benefit of reducing operational costs - as the experience development costs may be outsourced through these partnerships.

2.6 Regional Visitor Attractions Marketplace

The experience of other existing visitor attractions in the Bay of Fundy region provides useful contextual data on which to base operating recommendations and attendance projections for the Fundy Discovery Site. This table summarizes operating information on a number of the existing visitor attractions in the Bay of Fundy region.

From this data, we see that:

- » There are several attractions in the Bay of Fundy region that interpret part of the Fundy story (geology, fossils, tides, tidal energy, community history); however, there is currently no attraction that provides an overview of the broader Fundy story and its significance, or orients visitors to the region;
- » Average paid attendance levels at area attractions are relatively low, with Joggins Fossil Centre, which is a located at a UNESCO world heritage site, attracting the most paid visitors (14,024), followed by the Fundy Geological Museum, which is part of the provincial museum system (an average of 10,693 paid visitors);
- » The majority of local visitor attractions are open on a seasonal basis, or have reduced hours during winter months.
- » Admission fees are generally modest, ranging from free to a high \$10.50 at Joggins, which also includes a guided beach tour.

Table 11: Operating Information for Bay of Fundy Region Attractions

| Name                                      | Location        | Mission/Mandate   | Operating Schedule  | Avearage Attendance                                | Adult Admission |
|---|-----------------|---|---|--|-----------------|
| Annapolis Tidal Power Interpretive Centre | Annapolis Royal | To teach visitors about the power station, its history and the power of the Bay of Fundy.   | May - Oct.<br>Daily 10am – 6pm  | n/a  | free            |
| Colchester Historeum                      | Truro           | To collect, preserve, and exhibit, for the education and enjoyment of present and future generations, artifacts and documents relating to the social, cultural, and natural history of Colchester County. | June to Aug.<br>Mon. to Fri. 10am – 5pm,<br>Sat. 10am -4pm, Sun. closed<br><br>Apr. and May and Sept. to Nov.<br>Mon. to Fri. 10am – 12pm and 1pm – 4pm,<br>Sat. and Sun., closed<br><br>Dec. to March<br>Tues. to Fri. 10am – 12pm and 1pm – 4pm,<br>Sat., Sun., and Mon. closed | 2,291  | \$5.00          |
| FORCE Visitor Centre                      | Parrsboro       | To create a better understanding of the potential of in-stream tidal technology to deliver clean, renewable power.  | May, June, Sept., and Oct.<br>Thur. to Mon. 10am – 5pm<br><br>July and Aug.<br>Daily, 10am -5pm<br><br>Nov. to April<br>By appointment  | 4,091  | free            |
| Fundy Geological Museum                   | Parrsboro       | To present the history of geological time, with reference to the geological record, and focusing on the unique features of Nova Scotia’s Minas Basin and Bay of Fundy region.                             | Year-round<br>Tues. to Sat. 10am – 4pm  | 10,693   | \$8.50          |
| Fundy Tidal Interpretive Centre           | South Maitland  | To teach visitors about the famous Fundy tides, the highest tides in the world, and the unique Tidal Bore, as well as the rich heritage of the area.  | Victoria Day to Thanksgiving<br>Daily   | 2,025  | \$2.50          |
| Joggins Fossil Centre                     | Joggins         | To protect, conserve, and present the outstanding value of the Joggins Fossil Cliffs through research, education, and tourism.  | July -Sept.<br>Daily 10am – 5pm   | 14, 024<br>(Centre, paid)<br>22,000 (Site, unpaid) | \$10.50*        |

\*Includes admission to the Centre and l 1/2 hour beach tour.



### 3. ANALYSIS OF POTENTIAL MARKETS

While the positive momentum achieved by Nova Scotia’s tourism sector has been interrupted in 2020 due to the Covid-19 global pandemic, the trends and performance achieved in 2019 and prior years continue to provide valuable context for post-Pandemic recovery.

Tourism is one of Nova Scotia’s leading sources of service sector exports. From the 2010 baseline of \$2.02 billion, Nova Scotia tourism revenues increased by 29 percent to \$2.64 billion in 2019. Solid gains on export revenues were registered. In 2018, export revenues accounted for 65% of overall tourism revenues – up from 58% in 2010. This is evidence that the Province has been successful in attracting higher yield visitors, although 2020 revenues are expected to close at less than \$1 billion.

Tourism revenue is an important indicator to inform Nova Scotia tourism sector performance. Over the past decade tourism revenues have grown in all years except 2013 through 2015 and 2019. Estimated tourism revenues for 2019 of \$2.64 billion declined by 3.3% compared with the estimate of \$2.73 billion for 2018. Despite the 2019 revenue decline, tourism export growth (44%) has significantly outpaced resident revenues (8%).

Community traffic flow indicate that Bay of Fundy and Annapolis Valley Tourism Region is the second most popular destination within the province – topped only by Halifax. The Bay of Fundy and Annapolis Valley Tourism Region was second on the three key traffic flow metrics – total trips, same-day trips and overnight trips. This reflects the region’s status as an important destination and travel corridor.

Three in ten (28%) of the 2.4 million non-resident overnight visitors to Nova Scotia in 2018, had at least one same-day trip in the Region (**Table 12**). This increases to almost two in five (38%) when overnight visits are included.

Centrally located in the Bay of Fundy and Annapolis Valley Tourism Region, Truro leads the Region’s communities with a 42% capture rate (**Table 13**). One in ten (8%) of the overnight visitors to Nova Scotia, had at least one same-day trip to Truro. This doubles to 16% when overnight visits are included.

Table 12: Tourism by Region

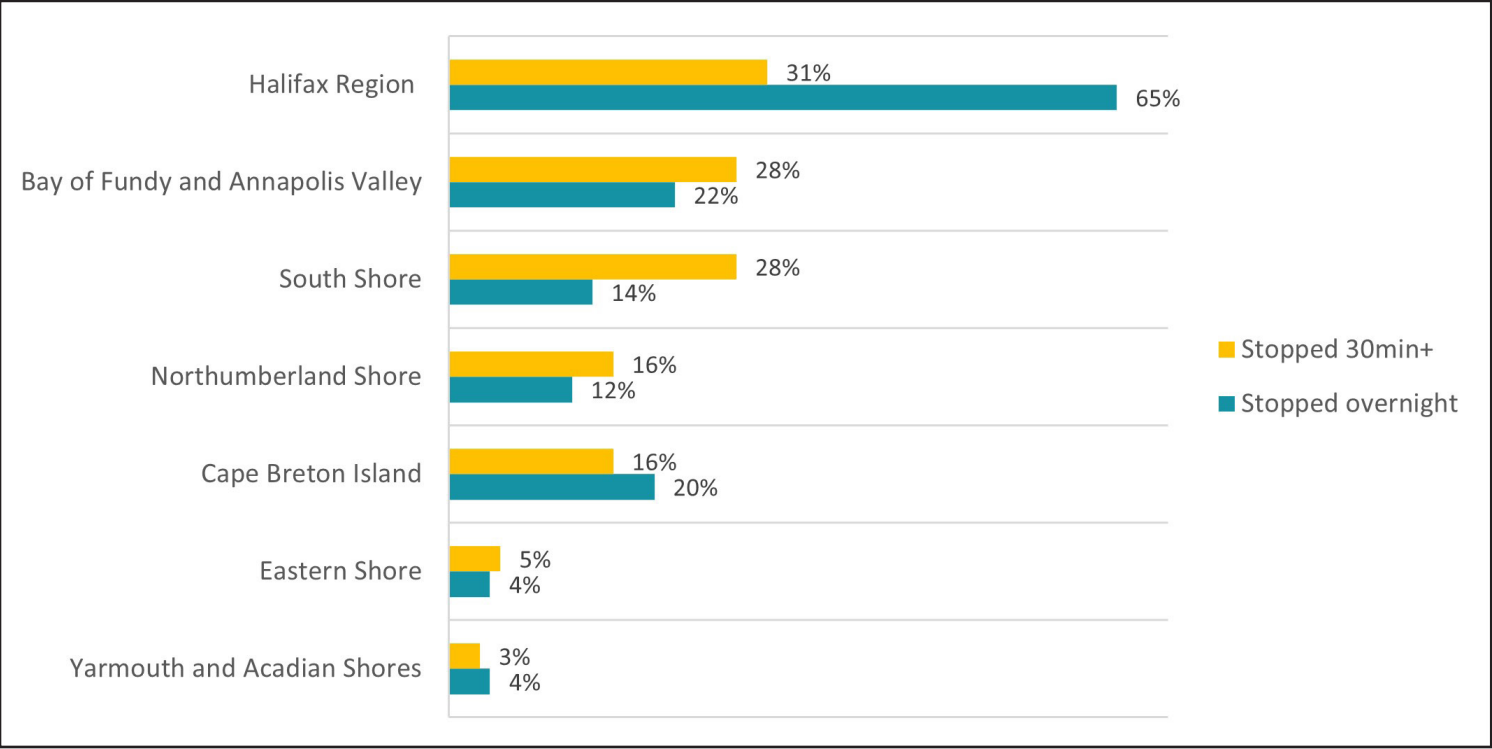
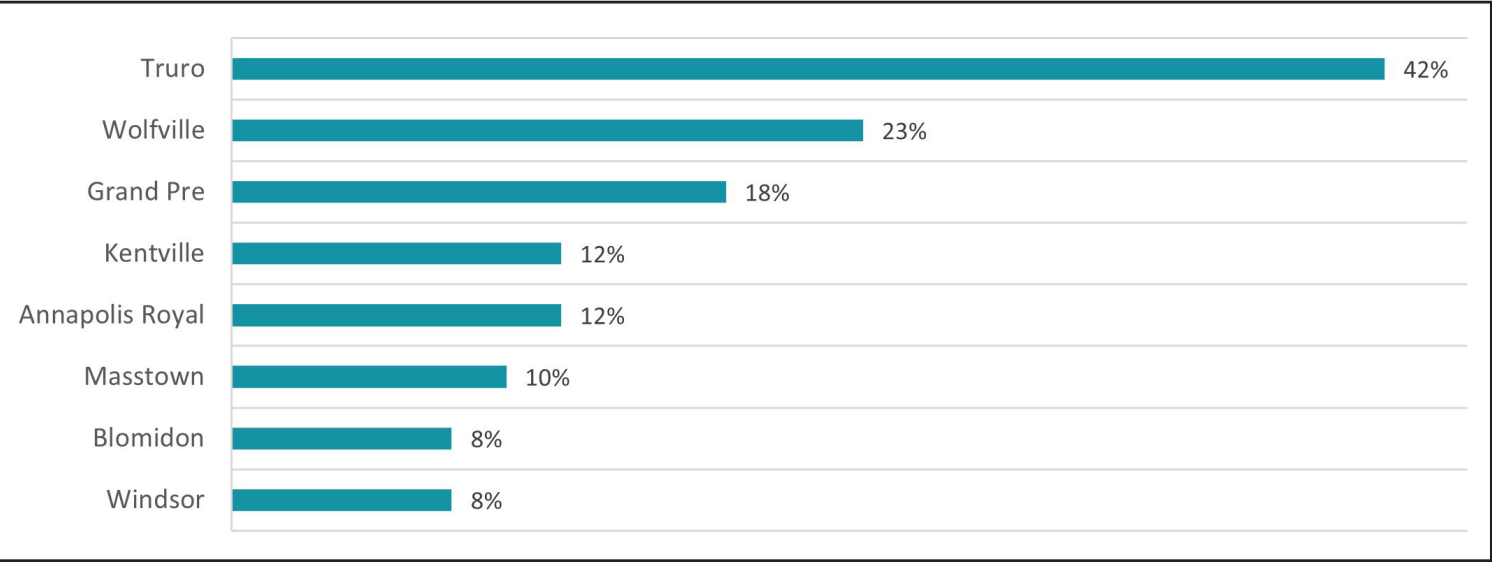


Table 13: Community Capture Rate



Nova Scotia welcomed 2.3 million non-resident overnight visitors in 2019, with over half of visitors from Atlantic Canada (**Table 14**). This represents a decline of 5% or 112,300 fewer visitors compared with 2018. The greatest decline was seen in overseas visitors (17%), while 4% declines were registered for both Atlantic Canada and Ontario visitors.

- » Visitation by air was down 8% or 62,200 fewer visitors compared with 2018.
- » Visitation by road was down 3% or 50,100 fewer visitors.

Despite the 2019 decline in visitation, overall visitation to the province increased by 10% over the past decade.

Over half of visitors enter the province by car through Amherst & Tidnish and three out of ten visitors enter through the Halifax International Airport (**Table 15**). This places the Fundy Discovery Site in a strategic position, making it highly visible to visitors entering the Province.

At the provincial level, accommodations operators across the province report that 2.7 million licensed room nights were sold in 2019, down 1% compared with 2018. This translates to an annual 6% decrease in room nights sold for the Bay of Fundy and Annapolis Valley Tourism Region.

Table 14: Nova Scotia Total Visitation by Origin

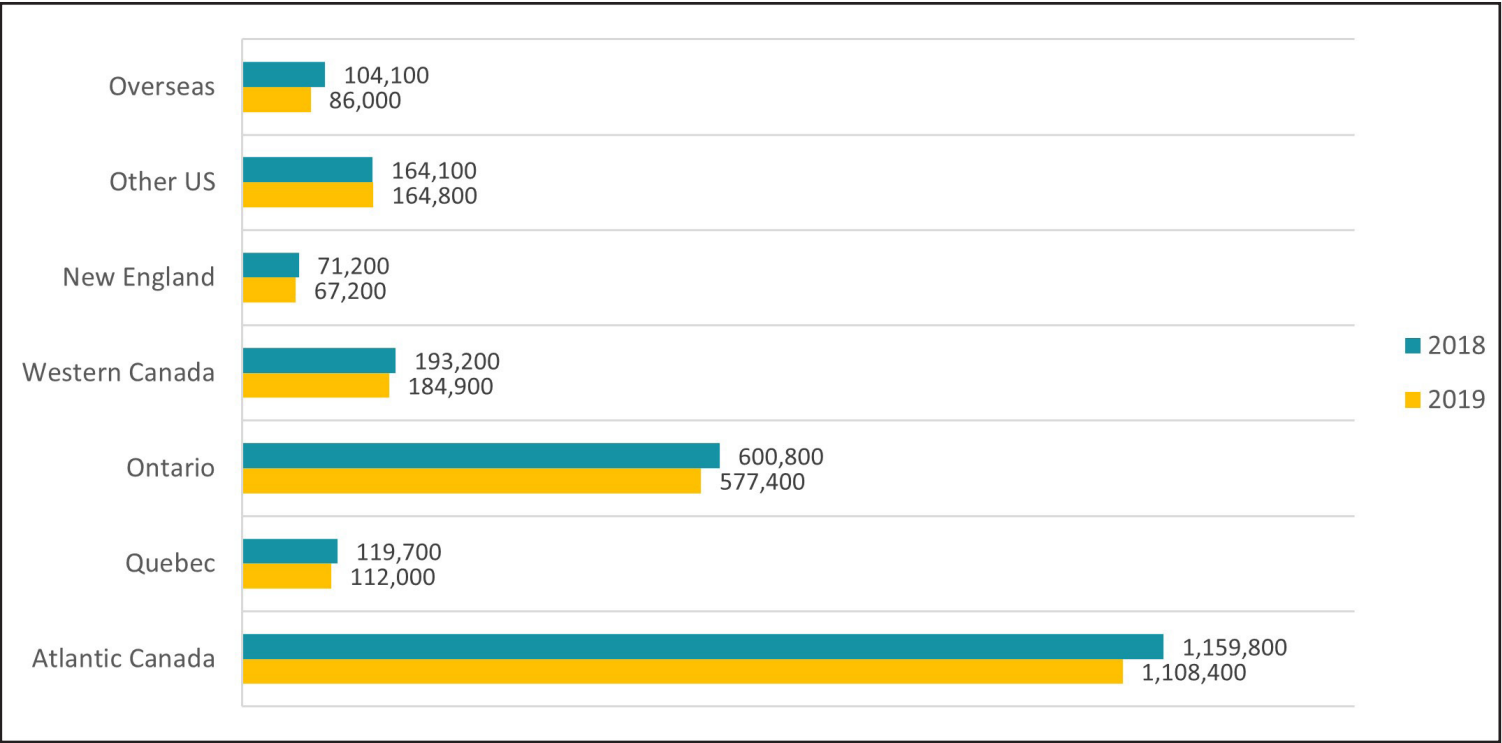
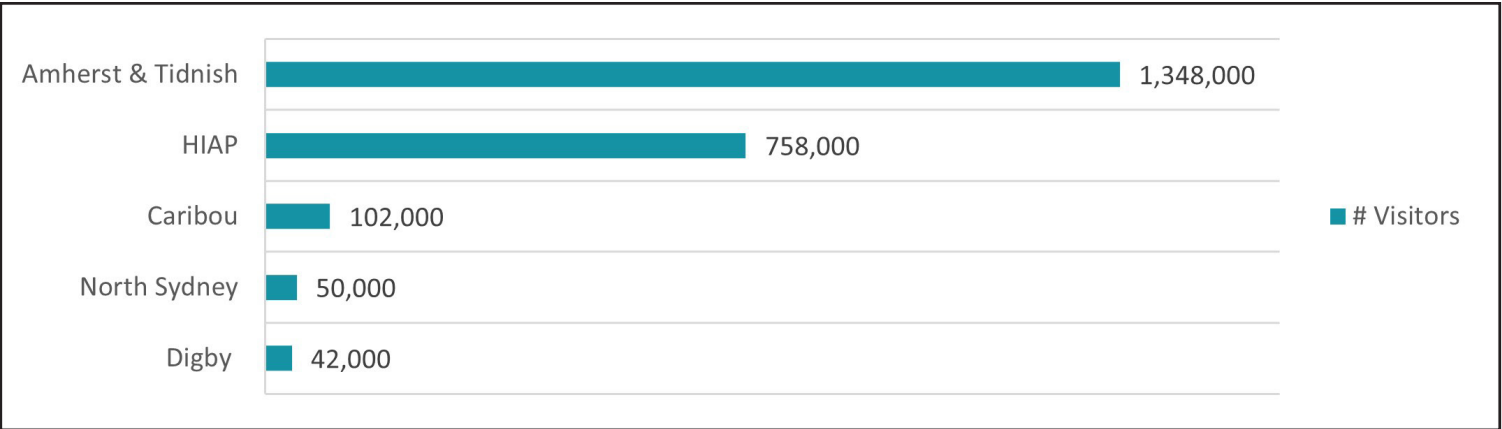


Table 15: 2019 Point of Entry into Nova Scotia

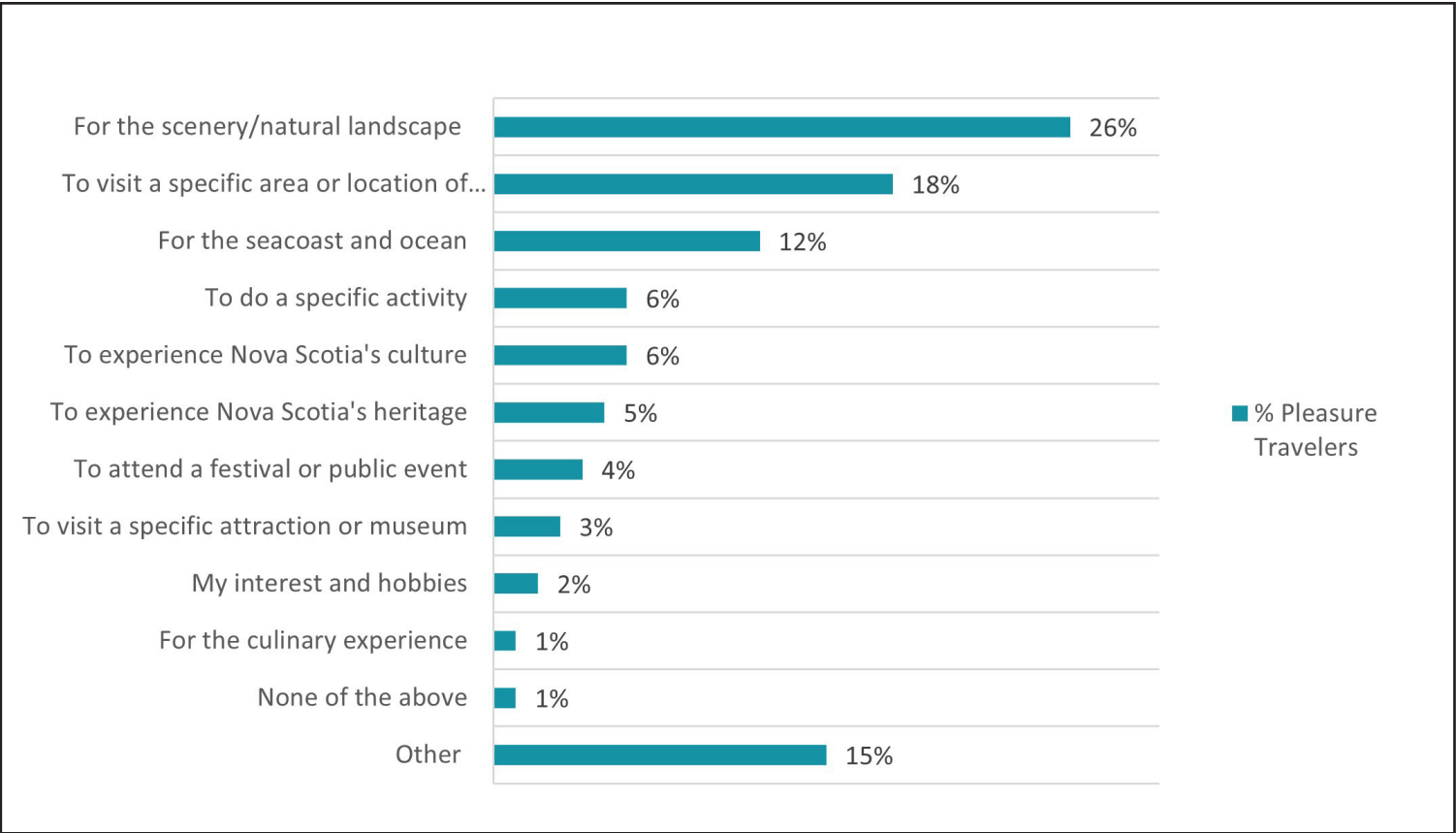




Outdoor activities and cultural and heritage experiences are the main motivators for pleasure travelers. One quarter (26%) of visitors state the main reason for their visit is the scenery and natural landscape, while 18% of visitors choose Nova Scotia for specific areas and 6% for specific activities (**Table 16**).

The main EQ segments captured in the province include Authentic Experiencers (26%), Cultural Explorers (17%) and Gentle Explorers (14%).<sup>1</sup>

Table 16: Motivation for Pleasure Travelers



1 <https://tourismns.ca/sites/default/files/2019-04/2017%20VES%20Market%20Profile%20-%20Atlantic%20Canada.pdf>

3.1 Local/Resident

While out-of-province visitors offer a promising source of traffic at the site, the non-resident market is very seasonal. Capturing local residents is therefore critical to ensure the long-term sustainability of the operation. Local residents represent close to 45,000 potential visitors, with some markets growing faster than provincial averages, and all are growing less than the national average (*Table 17*).

To capture the local market, the site needs to be relevant to local residents who are typically attracted by use of trail networks and available services on site such as vending, and interpretation (i.e. new way to see something with which they are familiar). Several features will help generate interest among local residents, including the natural playground. In addition to local residents, the site should attract all Nova Scotians as their interactions with non-residents is also important and represents a leverageable ambassadorial role and information source for visitors.

While the tides may be of less interest to more immediate residents, they are a draw for others. These include all types of people: young and older, families, adults, and mixed travel parties. The traffic leveraged by the tides will also be critical in sustaining local businesses present on site. Visitors typically gather an hour or more before the tidal bore and remain 30 minutes or more following the bore, giving vendors plenty of time to sell ice cream, coffee, snacks, etc.

Table 17: Local Residents Potential Visitors

|                       | Population 2011 | Population 2016 | % Change |
|-----------------------|-----------------|-----------------|----------|
| Colchester County     | 50,968          | 50,585          | -0.8%    |
| Truro                 | 12,059          | 12,261          | 1.7%     |
| Cumberland County     | 31,353          | 30,005          | -4.3%    |
| Total Resident Market | 82,321          | 80,590          | -2.1%    |
| Rest of Nova Scotia   | 839,406         | 843,008         | 0.4%     |
| Nova Scotia           | 921,727         | 923,598         | 0.2%     |
| Canada                | 33,476,688      | 35,151,728      | 5.0%     |



## 4. SUMMARY OF CONSULTATIONS

The potential uses emerging from engagement efforts centered around outdoor activities and interpretive nature of the site. The following potential uses were identified:

- » Leveraging the confluence of trails – active transportation hub
- » Cyclists
- » Hikers and walkers
- » Use of playground area and splash pad
- » Education and interpretation
- » Educational focused signage for self-guided tours (e.g. boards explaining the tides, fauna, history, and geological features)
- » Picnic area
- » Gateway to / information on other Bay of Fundy sites and experiences / other areas sites and experiences

### 4.1 On-Site Services & Vendors

The following on-site services and vendors with the potential to elevate visitor experiences and make an experience memorable were identified through engagement.

- » Ice cream – “ice cream is a destination”
- » Fish & chip wagon
- » Brew pub
- » T-Shirts and souvenirs (quality)
- » Bike rentals<sup>1</sup>
- » Guided hiking, walking, and biking tours
- » Interpretive educational tours suited for school groups
- » Municipal recreational programing; and
- » Venue for events and gatherings (e.g. dine on a bridge)
- » The desire for local merchants was emphasized. The site is seen as an opportunity for the expansion of existing businesses and incubation of new entrepreneurs. Furthermore, highlighting the offerings through the Millbrook Cultural Centre would allow for a cultural enrichment of the site and to further engage the Community.

Additionally, electrical, water, sanitary, lighting & trail lighting and connection support for events were identified as additional services and facilities required on site. Electrical car charging stations where individuals may charge their car ‘using the power of the tide’ offers a unique branding experience tailored to the evolving needs of the society. The site was also particularly noted as being well suited for RVs. Facilities such as public dump locations for RV travelers was notably identified as a gap in the region which may be accommodated at the Fundy Discovery Site.

<sup>1</sup> Segway rentals and rental of motorized scooters were also suggested however motorized vehicles are not currently permitted on the Cobequid Trail.

### 4.2 Emerging Issues, Concerns, & Considerations

Multiple elements for consideration and concerns were identified during engagement activities. A number of these addressed the operational aspect of the site and types of partnerships with potential vendors. These include the following:

- » Site maintenance – waste from onsite vending and responsibility for this (could be addressed in the site lease or rental agreements with vendors)
- » Rental / lease format – rental vs revenue share, rate setting that has provisions for social enterprise; no-profits; or new enterprises.
- » Cost impact to the Municipality – cost neutral or some cost with broader economic impact benefiting the overall economy.
- » Site management and maintenance – responsibility with Municipality.
- » Security and safety (e.g. ensuring people don’t swim in the river)
- » Ensuring the site remains modest was highlighted throughout engagement sessions. Multiple considerations regarding site design and available services were therefore brought forward including:
- » Type and category of vendors – no big chains – set criteria targeting unique and local, NS, and Atlantic products.
- » Design style and criteria – pods, sheds, trucks, and criteria for aesthetics; design consideration; and theme of the site.

# 5. ORGANIZATIONAL STRUCTURE & OPERATIONS

## 5.1 Ownership

The Fundy Discovery Site is currently owned and operated by the County of Colchester, and it is anticipated that the site and the Fundy Discover SiteDiscovery Centre will continue to be owned by the County.

## 5.2 Organizational Structure

This business plan assumes that the Fundy Discovery Site will be operated as a line department of the Municipality. This will enable the Municipality to continue to provide direct support to the site, (e.g. snow plowing, grounds and building maintenance, garbage removal, IT support , payroll and administrative support), and will greatly improve the operation efficiencies of the site.

- » It is recommended that the Municipality appoint an Advisory Committee to provide guidance to the Municipality on programming, exhibits and operational needs and opportunities for the Fundy Discovery Site. This Advisory Committee should include:
  - up to two members of Colchester Municipal Council
  - a member appointed by the Town of Truro
  - up to seven at-large members drawn from the tourism industry, academic community, and business community

## 5.3 Staffing

The recommended staffing complement for the Fundy Discovery Site and facility consists of three full-time, year-round staff positions, one part-time year-round staff position and five full-time seasonal (student) positions. It is assumed that these staff will be supported by existing municipal staff on functions such as site and building maintenance, garbage IT, payroll and human resources.

### General Manager

- » Terms of Employment: Full-time, year-round
- » Key Responsibilities:
  - Overall management of the day-to-day operations of the Fundy Discovery Site.
  - Leading financial planning, budgeting and reporting to the Municipality
  - Ensuring the efficient and effective use of the Site’s resources
  - Leading strategic and long-range planning
  - Managing funding agreements and fulfilling funder reporting requirements
  - Hiring, training and supervising staff (with support from municipal HR staff)
  - Developing and overseeing implementation of site operating policies and procedures
  - Coordinating site and building maintenance with municipal staff
  - Managing onsite vendor contracts (in partnership with Municipal staff)

### Marketing and Outreach Coordinator

- » Terms of Employment: Full-Time, Year-Round
- » Key Responsibilities:
  - Developing and implementing an overall marketing strategy for the site

- Overseeing development of marketing materials (print) and managing the site’s online marketing presence (website, social media)
- Working with the General Manager to meet attendance and revenue-generation targets
- Building relationships and maintaining communications with local partners including the tourism and hospitality industry, other attractions in the Bay of Fundy region, and schools and community groups
- Maintaining general distribution lists and mailing lists
- Overseeing the development and delivery of programs to appeal to target audiences
- Managing gift shop purchases

### Building/Grounds Maintenance Supervisor

- » Terms of Employment: Part-Time, Year-Round
- » Key Responsibilities:
  - Ensuring the cleanliness, safety and orderliness of the buildings, equipment, exhibits and site
  - Carrying out minor preventative maintenance and repairs
  - Assisting in the development of facility operation and maintenance schedule and budget;
  - Managing and directing janitorial,landscaping, snow removal and other related contractors



**Administrative Coordinator**

- » Terms of Employment: Part-Time, Year-Round
- » Key Responsibilities:
  - Overseeing inventory controls
  - Providing a wide variety of administrative support, including compiling statistics and reports
  - Processing daily incoming and outgoing mail
  - Maintaining office equipment in functional operating condition
  - Issuing invoices and purchase orders as required
  - Ordering office supplies
  - Maintaining filing systems
  - Providing general support to other staff

**Admission Staff/Interpreters**

- » Terms of Employment: Part-time, seasonal
- » Key Responsibilities:
  - » greeting and welcoming tour visitors and groups upon their arrival
  - » processing admissions and gift shop purchases
  - » engaging visitors in conversations and answering questions about the Centre and its interpretation
  - » delivering school and other educational programs

**Visitor Information Centre Customer Service Staff**

- » Terms of Employment: assume part-time, seasonal TBD two summer students
- » Key Responsibilities:
  - Answering questions and providing information about the Bay of Fundy Region and Truro area
  - Distributing promotional materials
  - Promoting tourism products and local businesses
  - Encouraging new and return visits

**5.4 Operating Schedule**

In order to maximize access to the Fundy Discovery Site for both residents and visitors, it is assumed that the site will operate according the following schedule

| Fundy Discovery Site Operating Schedule |               |                     |
|---|---------------|---------------------|
| May 1 - May 31                          | 7 days a week | 10:00 am to 4:00 pm |
| June 1 - mid-October                    | 7 days a week | 9:00 am to 5:00 pm  |
| mid October - mid-November              | 7 days a week | 10:00 am to 4:00 pm |

**5.5 Attendance & Financial Projections**

**5.5.1 General Assumptions**

In order for a business plan to be credible be credible, the plan must be based on clearly stated assumptions of what is being projected. This section of the report provides a summary of the business planning assumptions for the Fundy Discovery Site.

It must be noted that although no one can predict the future with certainty, the assumptions that underlie the attendance, revenue and expense projections must be considered reasonable at the time the projections were prepared. It must also be noted that the assumptions are presented as planning tools for the purposes of the projections. Assumptions, and therefore projections, are both subject to modification in the future as circumstances change and as decisions are finalized.

General Assumptions include:

- » Attendance, revenue and expense projections provided are based on conservative approximations extrapolated from research and knowledge available at the present time.
- » All revenue and expense projections are stated in 2020 dollars with inflationary increases made where applicable.
- » HST is not included in revenue and expense projections.
- » The projections assume debt-free operations. Should the Municipality choose to finance any part of the project with short or long-term debt vehicles, an appropriate allowance for debt servicing must be added to projected expenditures.

5.5.2 Site and Amenity Assumptions

The proposed site for the Fundy Discovery Site is 103 Tidal Bore Rd, Lower Truro, between Highway 102 and the Salmon River. Assumed site features and amenities include the following:

- » a pedestrian bridge will be built across the Salmon River, which will connect the site to the Blue Route (NS cycling route) and the Cobequid Trail.
- » a tidal bore viewing structure situated at the knuckle of the river and near the aboiteau inflow from McClure’s Brook
- » a playground (existing)
- » an amphitheatre (existing)
- » a park with picnic facilities
- » a tidal plaza with outdoor exhibits and a tidal clock
- » site signage and interpretation
- » access to a bike/pedestrian path connecting the site to Lower Truro and Truro
- » locations for onsite businesses such as food trucks, craft retails / artisan sales and bike rentals
- » onsite parking

5.5.3 Facilities

The key elements of the facilities plan that will influence attendance, operating revenues and expenses are as follows.

- » the Interpretive Centre will consist of 8,500 sq. ft. or 9,880 sq. ft. of gross total interior space, depending on the option chosen.
- » the Interpretive Centre will feature 3,300 sq. ft. of permanent exhibition space and 265 sq. ft. of temporary/changing exhibition space
- » the Centre will house a visitor information centre, which will be located in the lobby of the Centre and share 414 sq. ft. with the Centre’s gift shop, both of which will be accessible without paying admission to the Centre;
- » the Centre will feature an outdoor courtyard and program pavilion that will be suitable for events and programs.

5.5.4 Visitor Experience

The nature and quality of the visitor experience will have the greatest impact on attendance levels and earned income of the Centre. It is assumed that the visitor experience will include:

- » Immersive Bay of Fundy AV Experience, an animated and interactive AV gallery introducing the Bay of Fundy—its dramatic tides and other natural wonders, and cultures—in ways that allow visitors to interact with aspects of the story via digital technology.
- » Bay of Fundy Exhibit Gallery within the Interpretive Centre that introduces and explores key themes about the Bay of Fundy. These will work in tandem with the feature AV experience to present the regional and local Fundy story. Displays will include graphics, objects, and digital AV media.
- » Exhibits that present an overview of the UNESCO Cliffs of Fundy Geopark, introducing visitors to this unique destination as well as the features that are central to its recent designation.
- » Temporary exhibits devoted to locally themed exhibits and changing subject matter.

5.5.5 Other Operational Assumptions

Admission Fees

While admission to the site itself will be free of charge, the following admission fees for the Discovery Centre are as follows:

Marketing

Multiple strategies will be used to market the Fundy Discovery Site to resident, tourist, school and specialty markets, including:

- » prominent positioning of the site and centre in provincial tourism marketing.
- » placement of promotional road signage at key points including Highway #102 in both directions
- » development of print material to be displayed at visitor information centres, other regional attractions and hotels and purchased advertising in key tourism publications that encourage visitors to time their visit to coincide with tidal bore times
- » use of promotional media such as local and provincial print advertising, online / social media, local radio advertising and TV public service announcements supplemented by paid advertising spots.
- » organization of FAM (familiarization) tours of the site and Centre to make members of the media and tourism industry aware of the site/centre and the experiences that it offers.
- » establishment of partnerships with group sales companies to attract bus tours, bicycling tours, etc. to the Centre.
- » use of the dedicated web site that includes tidal bore times (www.FundyDiscovery.ca).
- » creation and distribution of a teacher’s guide that highlights the learning opportunities offered at the centre/site and links to curriculum.

Table 18: Projected Attendance

|                                     | Projected Attendance |        |                 |        |                 |        |                 |        |                 |        |
|-------------------------------------|----------------------|--------|-----------------|--------|-----------------|--------|-----------------|--------|-----------------|--------|
|                                     | Operating Yr. 1      |        | Operating Yr. 2 |        | Operating Yr. 3 |        | Operating Yr. 4 |        | Operating Yr. 5 |        |
|                                     | Visitors             | % Paid | Visitors        | % Paid | Visitors        | % Paid | Visitors        | % Paid | Visitors        | % Paid |
| Interpretive Centre Visitors (Paid) | 12,000               | 17%    | 10,800          | 17%    | 11,340          | 17%    | 11,907          | 17%    | 12,502          | 17%    |
| Site Visitors (Unpaid)              | 50,000               | 71%    | 45,000          | 71%    | 47,250          | 71%    | 49,613          | 71%    | 52,093          | 71%    |
| VIC Visitors (Unpaid)               | 8,500                | 12%    | 7,650           | 12%    | 8,033           | 12%    | 8,434           | 12%    | 8,856           | 12%    |
| Total annual Visitors               | 70,500               | 100%   | 63,450          | 100%   | 66,623          | 100%   | 69,954          | 100%   | 73,451          | 100%   |



5.5.6 Projected Attendance

There are no formulas for generating attendance projections for a new visitor attraction. Instead, attendance projections are informed by a number of factors:

- » Quality/uniqueness of the proposed visitor experience:
  - ♦ Market and contextual research demonstrate that there are no other attractions in the Bay of Fundy Region similar to the proposed Fundy Discovery Site – the Centre will be unique in the region.
  - ♦ the proposed visitor experiences to be offered at the site will of a very high quality and will appeal to tourist and local markets
- » Size, location and amenities of the attraction:
  - ♦ Thousands of cars pass by the site daily on Highway 102, making the site highly visible to large volume of potential visitors;
  - ♦ the new bridge will be visible from Hwy 102, which will further increase the visibility of the site
  - ♦ The site already attracts an average of 30,000 to 40,000 visitors annually, who come to view the bore, use the playground and other existing site amenities. New site amenities and infrastructure will add to the critical mass of things to see and do and greatly increase the draw of the site for visitors of a variety of ages, origins and interests.
  - ♦ The site will also serve as a gateway to the recently designated UNESCO Cliffs of Fundy UNESCO Global Geopark.

- » Experience of other visitor attractions in the region:
  - ♦ The Fundy Geological Museum has attracted between 10,000 and 12,000 paid visitors annually to Parrsboro in recent years, while the Joggins Fossil Centre has attracted between 12,000 and 15,000 paid visitors, and the Joggins Fossil Cliff site has attracted 20,000 and 25,000 unpaid visitors. Both sites are much less centrally located than the Fundy Discovery Site and the surrounding areas have smaller, less developed visitor infrastructures than the Truro area.

Based on these factors, as well as the knowledge and experience of the consultants, the following visitation projections have been developed for the Fundy Discovery Site. The projections are divided into three categories:

- » Interpretive Centre Attendance: those who pay admission to view the centre’s exhibits
- » Site Visitors: those who visit the site to take view the bore, use the playground/park facilities, take part in an outdoor event or patronize one of the onsite businesses, but do not pay for admission to the interpretive centre itself
- » Visitors to the Visitor Information Centre: those, who do not pay for admission to the Interpretive Centre but will enter the facility to make use of the services of the Visitor Information Centre

Projected Interpretive Centre Attendance

The paid attendance at the Fundy Discovery Site is projected to be 12,000 in Year 1 of its operations. As is the typical pattern for new visitor attractions, paid visitation is projected to decrease somewhat during year 2, as media coverage lessens and many locals will have visited during the opening year. In Years 3, 4, and 5, as the centre becomes better known and establishes a reputation in the market, it is expected that paid attendance will once again increase, exceeding Year 1 attendance by Year 5.

Projected Site Visitors

The addition of numerous site amenities, including a pedestrian/bike bridge, site interpretation, a tidal bore viewing platform, food vendors and complementary businesses like bike rentals and craft vendors, is expected to significantly increase the number visitors who come to the site to use the new amenities but do not pay to visit the Centre. These visitors are estimated at 45,000 in the first year and reaching over 52,000 visitors by Year 5.

Visitor Information Centre Users

Based on historical figures for users of the existing Visitor Information Centre on the site, and taking into consideration the enhanced profile the site will have following completion of this project, it is estimated that the number of users of the Visitor Information Centre following completion of the project will be in the range of 8,500.

Total Projected Attendance/Site Users

As illustrated, these assumptions lead to total projected annual visitation at the Fundy Discovery Site of 70,500 in Year 1 following completion of the project, increasing to over 73,000 visitors by Year 5.

Table 19: Projected Attendance

|                                     | Projected Attendance |        |                 |        |                 |        |                 |        |                 |        |
|-------------------------------------|----------------------|--------|-----------------|--------|-----------------|--------|-----------------|--------|-----------------|--------|
|                                     | Operating Yr. 1      |        | Operating Yr. 2 |        | Operating Yr. 3 |        | Operating Yr. 4 |        | Operating Yr. 5 |        |
|                                     | Visitors             | % Paid | Visitors        | % Paid | Visitors        | % Paid | Visitors        | % Paid | Visitors        | % Paid |
| Interpretive Centre Visitors (Paid) | 12,000               | 17%    | 10,800          | 17%    | 11,340          | 17%    | 11,907          | 17%    | 12,502          | 17%    |
| Site Visitors (Unpaid)              | 50,000               | 71%    | 45,000          | 71%    | 47,250          | 71%    | 49,613          | 71%    | 52,093          | 71%    |
| VIC Visitors (Unpaid)               | 8,500                | 12%    | 7,650           | 12%    | 8,033           | 12%    | 8,434           | 12%    | 8,856           | 12%    |
| Total annual Visitors               | 70,500               | 100%   | 63,450          | 100%   | 66,623          | 100%   | 69,954          | 100%   | 73,451          | 100%   |

5.6 Estimated Revenues

5.6.1 Admissions

Based on typical patterns among other visitor attraction in the region, it is expected that the majority of paid visitors to the Fundy Discovery Centre will visit independently, while 10% will visit as part of a tour or community group and 3% will visit as part of a school group.

Based the recommended admission fees, it is projected that the average admission fee paid by independent visitors will be \$7.00; the average admission fee paid by group visitors will be \$6.50 per person; and the average admission fee paid by school groups will be \$2.75 per person.

These assumptions and the foregoing attendance projections lead to the following projections of revenue from admissions.

Table 20: Projected Revenue From Admissions

| Projected Revenue From Admissions |                    |               |          |          |          |          |          |
|-----------------------------------|--------------------|---------------|----------|----------|----------|----------|----------|
| Visitor Type                      | % of Paid Visitors | Average       |          |          |          |          |          |
|                                   |                    | Admission Fee | Year 1   | Year 2   | Year 3   | Year 4   | Year 5   |
| Independent Visitors              | 87%                | \$7.00        | \$73,080 | \$65,772 | \$69,061 | \$72,514 | \$76,139 |
| Group Visitors                    | 10%                | \$6.50        | \$7,800  | \$7,020  | \$7,371  | \$7,740  | \$8,127  |
| School Group Visitors             | 3%                 | \$2.75        | \$990    | \$891    | \$936    | \$982    | \$1,031  |
| Total admissions revenue          |                    |               | \$81,870 | \$73,683 | \$77,367 | \$81,236 | \$85,297 |

5.6.2 Retail

It is projected that a third of all visitors to the Fundy Discovery Site will make a purchase in the Centre’s gift shop at an average purchase of \$3.50 per person in Year 1, increasing by 2% in each subsequent year. Costs of goods sold are estimated at 60%. These assumptions lead to the followed projected revenues from retail sales.

Table 21: Projected Revenue and Expenses - Retail Sales

| Projected Revenue and Expenses -Retail Sales   |           |           |           |           |            |
|--|-----------|-----------|-----------|-----------|------------|
|  | Year 1    | Year 2    | Year 3    | Year 4    | Year 5     |
| Total Site Visitors                            | 70,500    | 63,450    | 66,623    | 69,954    | 73,451     |
| Percentage of Visitors Making Retail Purchases | 33%       | 33%       | 33%       | 33%       | 33%        |
| Average purchase amount                        | \$ 2.50   | \$ 3.00   | \$ 3.60   | \$ 4.32   | \$ 5.18    |
| Projected Gross Revenue                        | \$ 58,163 | \$ 62,816 | \$ 79,148 | \$ 99,726 | \$ 125,655 |
| Expenses:                                      |           |           |           |           |            |
| Cost of sales and expenses- 60%                | 34,898    | 37,689    | 47,489    | 59,836    | 75,393     |
| Net Revenue from Retail Sales                  | \$ 23,265 | \$ 25,126 | \$ 31,659 | \$ 39,890 | \$ 50,262  |

5.6.3 Rental Income

Rental income at the Fundy Discovery Site will include:

- » pad fees paid by vendors operating food and beverage concessions, recreational equipment rentals or related business at the site.
- » rental fees paid for exclusive use of the pedestrian bridge for large scale special events
- » rentals feeds for use of the Centre’s courtyard for special events
- » rentals of the Centre’s lobby for special events

It is projected that:

- » two vendor pads will be rented for a period of six months at a rate of \$220 a month in Year 1, increasing to three pads in Year 2. In Year 3, the number of pad rentals will remain the same, but the monthly rent will increase to \$250. In Year 4, the number of pad rentals will increase to four, while the monthly rent will remain at \$250. In Year Five, the number of pad rentals will remain at four while the monthly rental rate will increase to \$300
- » the bridge will be rented once per year in Years 1, 2 and 3 at a rental fee of \$1,000 per rental, increasing to two rentals per year in Years 4 and 5
- » the courtyard will be rented two times per year in Year 1, three times per year in Years 2, 3 and 4 and 5, at a rental fee of \$500 per rental
- » the lobby space will be rented twice in Year 1 and three times per year in Years, 2, 3, 4 and 5, at a rate of \$200 per rental.

These assumptions lead to the follow projected revenues from rentals.

Government Grants

Like other community amenities, such as libraries, recreation centres and hospitals, cultural and tourism attraction like the proposed Fundy Discovery Site are not self-supporting. They typically rely on government funding for the majority of their operating funding. However, because it is impossible to predict with any certainty the future availability of government operating funds, the projections in this business plan do not include an assumed amount of ongoing operating grants from government.

Similarly, without conducting a fundraising feasibility study, it is impossible to project the amount of revenue that an attraction like the Fundy Discovery Site might be able to raise from contributed sources. As such, this business plan does not include a projected amount from fundraising.

Rather, the bottom-line difference between projected revenues and expenses is expressed as the amount of income required from government grants, fundraising, or other sources to break-even.

Table 22: Projected Revenue From Rental Income

| Projected Revenue From Rental Income |         |         |         |         |         |
|--------------------------------------|---------|---------|---------|---------|---------|
|                                      | Year 1  | Year 2  | Year 3  | Year 4  | Year 5  |
| Vendor Pad Fees                      | \$2,400 | \$3,600 | \$4,500 | \$6,000 | \$7,200 |
| Event Rentals (bridge)               | \$1,000 | \$1,000 | \$1,000 | \$2,000 | \$2,000 |
| Event Rental (Courtyard)             | \$1,000 | \$1,500 | \$1,500 | \$1,500 | \$1,500 |
| Event Rentals (lobby)                | \$600   | \$800   | \$800   | \$800   | \$800   |
| Total rental income                  | \$3,400 | \$4,600 | \$5,500 | \$8,000 | \$9,200 |



5.7 Projected Fundy Discovery Site Expenses

The following pertain to the operations of the Fundy Discovery Site and Visitor Information services and should include the municipality’s total costs to operate the entirety of the site (e.g., full cost of road mainetance, snow removal, landscaping, and related).

Staffing

Projected expenses for salaries, wages and benefits are based on the following assumptions.

General Manager

- » Full-Time, Year-Round
- » Starting salary of \$65,000 per year, with increases of 2% annually in subsequent years

Marketing and Outreach Coordinator

- » Full-Time, Year-Round
- » Starting salary of \$47,000 per year, with annual increases of 2% annually in subsequent years

Building/Grounds Maintenance Coordinator

- » Part-Time, Year-Round, 20 hours a week, 50 weeks per year
- » Starting wage of \$20.69 per hour with increases of 2% annually in subsequent years

Administrative Coordinator

- » Part-Time, Year-Round, 30 hours per week, 50 weeks per year
- » Starting wage of \$21 per hour, with increases of 2% annually in subsequent years

Admission Staff/Interpreters

- » 2 Full-Time, Year-Round positions (five days a week, 6 hours a day for 4 weeks in the spring and four weeks in the fall; 8 hours a day for 18 weeks in the summer)
- » 2 Part-Time, Year-Round postions (2 days a week, 6 hours a day for 4 weeks in the spring and four weeks in the fall; 8 hours a day for 18 weeks in the summer)
- » Starting wage of \$14 per hour, with increases of 2% annually in subsequent years
- » An allowance of \$40,000 per year has been made for VIC staff in Year 1, with increases of 2% annually in subsequent years.
- » Employment grants of \$17,000 for VIC staff have been projected in Year 1, based on past grant history, with increases of 2% annually in subsequent years.

An allowance of 13% of staffing costs has been added for employment related benefits.

Other Assumptions

It is assumed that existing Municipal staff will assist with the following tasks at the Fundy Discovery Site, which will allow the Centre to reduce the number of dedicated staff required:

- » Bookkeeping
- » IT support
- » HR support
- » Administrative support

These assumptions lead to the following projected staffing expenses:

Table 23: Projected Expenses - Salaries, Wages and Benefits

| Projected Expenses -Salaries, Wages and Benefits |           |           |           |           |           |
|--|-----------|-----------|-----------|-----------|-----------|
|  | Year 1    | Year 2    | Year 3    | Year 4    | Year 5    |
| General Manager                                  | \$65,000  | \$66,300  | \$67,626  | \$68,979  | \$70,358  |
| Marketing and Outreach Coordinator               | \$47,000  | \$47,940  | \$48,899  | \$49,877  | \$50,874  |
| Administration Coordinator                       | \$21,000  | \$21,420  | \$21,848  | \$22,285  | \$37,632  |
| Admission Staff/Interpreters                     | \$37,632  | \$38,385  | \$39,152  | \$48,374  | \$49,342  |
| Building/Grounds Maintenance Coordinator         | \$20,690  | \$21,104  | \$21,526  | \$21,956  | \$22,396  |
| Visitor Information Centre Staff                 | \$40,000  | \$40,800  | \$41,616  | \$42,448  | \$43,297  |
| Less: Employment grants for VIC staff            | -\$17,000 | -\$17,340 | -\$17,687 | -\$18,041 | -\$18,401 |
| Subtotal- salaries and wages                     | \$214,322 | \$218,608 | \$222,981 | \$227,440 | \$231,989 |
| Benefits at 13%                                  | \$27,862  | \$28,419  | \$28,987  | \$28,987  | \$30,159  |
| Total Salaries, Wages and Benefits               | \$242,184 | \$247,028 | \$251,968 | \$256,428 | \$262,148 |

Occupancy

Occupancy costs are generally defined as all costs, excluding salaries, associated with building utilities, repairs and maintenance, security systems and insurance. An analysis of the occupancy costs at the Joggins Fossil Institute, the Fundy Geological Museum, and the Fundy Ocean Research Centre for Energy (FORCE) indicated that the occupancy costs at these sites averaged \$5.74 per square foot. Allowing for the time between now and when the centre is built, an occupancy cost of \$6,00/SF has been used to calculate the Year 1 occupancy costs for the Fundy Discovery Site. An escalation of 2% has been added in each of the subsequent years. These assumptions lead to the following projected occupancy costs for the Fundy Discovery Site.

Administration and Marketing

Projected administrative costs include:

- » Bank and credit card charges (2.5% of admissions)
- » Office equipment rentals and office expenses (assuming preferential rate negotiated by the Municipality)
- » Telephone and communications (assuming preferential rate negotiated by the Municipality)
- » travel

Allowances have been budgeted for:

- » advertising and promotion expenses
- » printing of promotional materials
- » memberships in local tourism and professional associations
- » A 2% escalation in costs in each year subsequent to Year 1 has been added.

These assumptions lead to the following projected administrative and marketing expenses.

Table 24: Projected Occupancy Costs

| Projected Occupancy Costs       |                          |          |          |          |          |          |
|---------------------------------|--------------------------|----------|----------|----------|----------|----------|
|                                 | Gross Building Area (SF) | Year 1   | Year 2   | Year 3   | Year 4   | Year 5   |
| Occupancy costs per square foot |                          | \$6.00   | \$6.12   | \$6.24   | \$6.37   | \$6.49   |
| Option A                        | 8,500                    | \$51,000 | \$52,020 | \$53,060 | \$54,122 | \$55,204 |
| Option B                        | 9,880                    | \$59,280 | \$60,466 | \$61,675 | \$62,908 | \$64,167 |

Table 25: Projected Expenses - Administration and Marketing

| Projected Expenses -Administration and Marketing |                 |                 |                 |                 |                 |
|--|-----------------|-----------------|-----------------|-----------------|-----------------|
|  | Year 1          | Year 2          | Year 3          | Year 4          | Year 5          |
| <b>Administration</b>                            |                 |                 |                 |                 |                 |
| Bank and credit card charges                     | \$2,047         | \$1,842         | \$1,934         | \$2,031         | \$2,132         |
| Office equipment and expenses                    | \$6,000         | \$6,120         | \$6,242         | \$6,367         | \$6,495         |
| Telephone and communications                     | \$4,500         | \$4,590         | \$4,682         | \$4,775         | \$4,871         |
| Travel   | \$2,000         | \$2,040         | \$2,081         | \$2,122         | \$2,165         |
| <b>Total administration</b>                      | <b>\$12,547</b> | <b>\$12,552</b> | <b>\$12,858</b> | <b>\$13,174</b> | <b>\$13,498</b> |
| <b>Marketing and Communications</b>              |                 |                 |                 |                 |                 |
| Advertising and promotion                        | \$20,000        | \$16,000        | \$16,320        | \$16,646        | \$16,979        |
| Print materials                                  | \$7,500         | \$5,000         | \$5,100         | \$5,202         | \$5,306         |
| Memberships                                      | \$500           | \$510           | \$520           | \$531           | \$541           |
| <b>Total marketing and communications</b>        | <b>\$28,000</b> | <b>\$21,000</b> | <b>\$21,420</b> | <b>\$21,848</b> | <b>\$22,285</b> |
| <b>Total admin and marketing costs</b>           | <b>\$40,547</b> | <b>\$33,552</b> | <b>\$34,278</b> | <b>\$35,022</b> | <b>\$35,783</b> |

Programming Expenses

In order to generate repeat visitation, it will be important to periodically introduce new / updated content into the Fundy Discovery Site’s visitor experience. The plan for the Centre includes space for a temporary/ changing exhibit gallery, and an allowance has been made for the production of a small temporary exhibition on Bay of Fundy-related topics in Year 3 and Year 5. It is assumed that these exhibits will be developed in partnership with other attractions in the Bay of Fundy Region and/ academic partners who will also contribute to the cost of the exhibits or make in-kind contributions.

An allowance of \$3,000 for the cost of exhibit maintenance has been made starting in Year 2, following the end of the warranty period, increasing in each of the subsequent years as wear and tear on the exhibit could be expected to increase the cost of maintenance.

An allowance of \$3,000 has been made for costs related to the development of school and other educations programs, starting in Year 1 and increasing by 2% annually in subsequent years.

These assumptions lead to the following projected programming and Exhibit expenses.

Table 26: Projected Programming and Exhibit Expenses

| Projected Programming and Exhibit Expenses |          |          |           |          |           |
|--|----------|----------|-----------|----------|-----------|
|  | Year 1   | Year 2   | Year 3    | Year 4   | Year 5    |
| Temporary exhibits                         |          |          | 10,000    |          | 10,200    |
| Exhibit maintenance                        |          | 3,000    | 3,500     | 4,000    | 5,000     |
| Educational Program Development            | \$3,000  | 3,060    | 3,121     | 3,184    | 3,247     |
| Total expenses                             | \$ 3,000 | \$ 6,060 | \$ 16,621 | \$ 7,184 | \$ 18,447 |



5.8 Revenue & Expense Summary

This final table summarizes all of the foregoing projections of revenue and expenses for the Fundy Discovery Site.

As illustrated, the additional revenue from government sources and fundraising to break even on operations is between \$371,000and \$389,000 in Year 1, depending on whether the Municipality choses space plan Option A or B.

This amount increases to between \$446,00 and \$455,000 by Year 5 of operations.

Table 27: Summary of Projected Revenues and Expenses

| Summary of Projected Revenues and Expenses                                |            |            |            |            |            |
|---|------------|------------|------------|------------|------------|
|   | Year 1     | Year 2     | Year 3     | Year 4     | Year 5     |
| Revenue   |            |            |            |            |            |
| Admissions  | \$81,870   | \$73,683   | \$77,367   | \$81,236   | \$85,297   |
| Giftshop  | \$58,163   | \$62,816   | \$79,148   | \$99,726   | \$125,655  |
| Rental  | \$3,400    | \$4,600    | \$5,500    | \$8,000    | \$9,200    |
| Total revenue   | \$143,433  | \$141,099  | \$162,015  | \$188,961  | \$220,152  |
| Expenses  |            |            |            |            |            |
| Staff salaries, wages and benefits  | \$242,184  | \$247,028  | \$251,968  | \$256,428  | \$262,148  |
| Giftshop expenses   | \$34,898   | \$37,689   | \$47,489   | \$59,836   | \$75,393   |
| Programming and event expenses  | \$3,000    | \$6,060    | \$16,621   | \$7,184    | \$18,447   |
| Occupancy (Option A)  | \$51,000   | \$52,020   | \$53,060   | \$54,122   | \$55,204   |
| Occupancy (Option B)  | \$59,280   | \$60,466   | \$61,675   | \$62,908   | \$64,167   |
| Administration and marketing  | \$40,547   | \$33,552   | \$34,278   | \$35,022   | \$35,783   |
| Total expenses (Option A)   | \$515,061  | \$517,447  | \$565,431  | \$601,552  | \$667,127  |
| Total Expenses (Option b)   | \$523,341  | \$525,893  | \$574,046  | \$610,339  | \$676,089  |
| Amount Required From Government and Fundraising to Break Even (Option (A) | \$ 371,628 | \$ 376,349 | \$ 403,417 | \$ 412,590 | \$ 446,975 |
| Amount Required From Government and Fundraising to Break Even (Option (B) | \$ 379,908 | \$ 384,795 | \$ 412,031 | \$ 421,377 | \$ 455,938 |

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