



# SWOT Session Report

Report to the Valley REN

from the Sector Table Workshop on December 7, 2016

(Report revised for web publication, January 2017)



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## Background

### Session Purpose

The Valley Regional Enterprise Network (Valley REN) serves as a catalyst for regional economic development in the Annapolis Valley. As an inter-municipal corporation led by a private-sector board, its mandate is to provide leadership and guide economic development across the region on behalf of seven municipal partners, Glooscap First Nation, and the Province of Nova Scotia. The Valley REN’s three-year strategic plan identifies five strategic sectors for business development:

- Agriculture
- Tourism
- Manufacturing
- Information and Communication Technologies (ICT); and
- Sustainable Energy

As part of the strategy implementation, the Valley REN formed sector tables for each of these key industry sectors. A Sector Table Workshop was held on 7 December, 2016, to bring participants together to identify the key strengths, weaknesses, opportunities, and threats that should be addressed in the Valley REN’s business plan. This event was facilitated and documented by Common Good Solutions, with the support of Valley REN board members as table facilitators.

### Session Agenda

Timing	Activity
8:30 to 8:45	Arrivals and networking. Participants were directed to sit at their respective sector tables.
8:45 to 9:00	Kelly Ells and Emily Konrath of the Valley REN presented on the background and context for the session. Andy Horsnell of Common Good Solutions (facilitator for the session) provided an overview of the session.
9:00 to 10:00	Identifying the long list of sector issues. Each sector table, with the support of the table facilitators, generated four lists: key strengths, weaknesses, opportunities, and threats related to their respective sector.
10:00 to 10:20	Break with “Gallery Walk” Participants were directed to walk around the room, view the other table’s SWOT lists, and post questions and suggestions using Post-it notes.
10:20 to 10:40	Prioritizing the issues Using “dot-mocracy” voting, participants in each sector table identified the highest-priority strengths, weaknesses, opportunities, and threats for their sector.
10:40 to 10:50	Reporting back. Each sector table shared with the whole group their sector’s top 3 strengths, weaknesses, opportunities, and threats.
10:50 to 11:00	Andy and Kelly outlined what would come after this session: a) Common Good Solutions will draft the session report and present it to the Valley REN, and b) the Valley REN will use the report, and

	the key findings contained therein, to guide its business planning, in ongoing consultation with each sector table.
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## Session Participants

Please see Appendix B for a complete list of session participants.

## Regarding Selection of the Key Sector Issues

Top-priority issues were identified by each sector table for their respective sector through a “dot-mocracy” voting process, wherein each participant was instructed to allocate three “votes” (indicated by dots) to those individual items listed under each category (strengths, weaknesses, opportunities, threats), according to their priority. The facilitator encouraged the participants to consider two key factors when allocating their votes: a) the effort and cost of addressing the issue, and b) the potential impact of addressing the issue on the development of their sector. The number of votes allocated to each item are indicated (in parentheses).

## Agriculture Sector - Participants and Key Issues

### Agriculture Sector Table Participants

- Linda Best, FarmWorks Investment Co-operative
- Lance Bishop, Wild Mountain Farms
- Keltie Butler, Farmers' Markets of Nova Scotia Cooperative
- Sean Cochrane, Nova Scotia Business Inc. (NSBI)
- Tom Cosman, Cosman and Whidden Honey
- Jodi den Haan, den Haan Greenhouses
- Danny Dill, Dill Family Farm
- Duncan Ebata, Food Community Builder and Marketer
- Peter Hicklenton, FarmWorks Investment Co-operative
- Emily Konrath, Valley REN (sector table co-facilitator)
- Brian MacCulloch, Department of Agriculture
- Allison Maher, Dempsey Corner Orchard
- Coby Milne, Valley REN Board Member (sector table co-facilitator)
- Gary Morton, Morton Horticultural Associates
- David Newcombe, Cornwallis Farms
- Kyla Pierik, Perennia
- Ben Roy, Farm Credit Canada
- Av Singh, Centre for Small Farms
- Alan Stewart, Horton Malt Ridge
- Gillian Wesley, Farmers' Markets of Nova Scotia Cooperative
- Judy Rafuse, Annapolis Valley Chamber of Commerce
- Margie Lamb, Meadowbrook Meat Market
- Wendy Rodda, Valley Flax Flour

### Key Issues for the Agriculture Sector

Nota bene: due to how this table chose to group its many issues, the numeric voting was not used for the final selection of issues.

#### Key Strengths to Build Upon

- Local suppliers
- Land availability
- Passion within the industry

#### Key Weaknesses to Address

- Limited processing facilities
- Don't know the benefits of local economy
- Lack of workers

#### Key Opportunities to Explore

- Local food movement: investment and CEDIFs (community economic development investment funds); marketing; food security
- Use of technology: value-added and QPT
- Exporting

#### Key Threats to Address

- Government regulations slowing business growth
- "Can't do" attitude
- Lack of co-operation
- Lack of dependable, willing labour

## ICT Sector - Participants and Key Issues

### ICT Sector Table Participants

- Mike Caplan, Refresh Annapolis Valley
- Terry Dalton, *i-Valley*
- John Frost, PrecisionHawk
- Scott Hearn, Valley REN board member (sector table facilitator)
- Shameer Iqbal, Singolar
- Dr. Jim Retallack, Acadia Management Group Inc.
- Paul Richards, Innovacorp and BioEnterprise (Maritimes)
- Mark Richards, Annapolis Valley Regional School Board
- Wayne St. Amour, NSCC: IT Campus
- Mike Suhonos, Computerized Business Solutions
- Hayly Thackeray, Computer Science Society at Acadia University
- Bob Thomas, Progeny Software

### Key Issues for the ICT Sector

#### Key Strengths to Build Upon

- ICT institutions: Acadia, NSCC, AIDA, Innovacorp, Valley Fibre Net, isoCS, Refresh Annapolis Valley, Valley Launch Box
- High quality of life (5)

#### Key Weaknesses to Address

- Access to qualified, experienced people (11)
- Diversity (i.e. lack of women) (8)
- No one knows what the industry is doing (5)

#### Key Opportunities to Explore

- Proximity to talent pool: NSCC and Acadia (10)
- Draw talent from other areas (7)
- Collaboration with other sectors, i.e. agriculture (5)

#### Key Threats to Address

- Retaining and growing the talent pool (13)
- Global competition (7)

## Manufacturing Sector - Participants and Key Issues

### Manufacturing Sector Table Participants

- Barry Gander, Valley REN Board Member (sector table facilitator)
- Heather Lunan, Pie R Squared
- Chad MacDonald, CKF
- Shannon MacLean, Nova Scotia Fisherman
- Andrew Schnare, Xerium
- Howard Selig, Valley Flax Flour

### Key Issues for the Manufacturing Sector

#### Key Strengths to Build Upon

- Supplier hub (7)
- Exchange between manufacturers (6)
- Knowledge sharing (5)

#### Key Weaknesses to Address

- Make it more attractive to do business in NS (5)
- Transportation - truck and rail (3)
- Shipping and export costs (2)
- Labour to produce (2)

- Cost of energy - natural gas, electricity (2)

#### Key Opportunities to Explore

- Awareness of manufacturing (8)
- Use of waste (5)
- Access to universities and colleges (2)
- Increased value added product development

#### Key Threats to Address

- Import competition -> fairness (7)
- Resource needs: cost, regulations (3)
- Global currency flux (2)

## Sustainable Energy Sector - Participants and Key Issues

### Sustainable Energy Sector Table Participants

- Andrew Bagley, Nova Solar Capital
- Shawna Eason, Nova Scotia Department of Energy
- Kelly Ells, Valley REN (sector table facilitator)
- Marcus Goodick, Enviro Culture
- Christine Heap, Nova Solar Capital
- Dr. Anna Redden, Acadia Tidal Energy Institute
- Rob Sedgwick, Sage Energy
- Scott Skinner, Clean Foundation

### Key Issues for the Sustainable Energy Sector

#### Key Strengths to Build Upon

- Youth interested in sector (1): draw on Acadia (2), NSCC Middleton Renewables Engineering program, research capacity of Acadia and NSCC, existing expertise in community, quality of people skills
- Engaged community (4)
- Energy efficiency programs and supply chain (3)

#### Key Weaknesses to Address

- Lack of consumer awareness of options (5)
- Regulatory process (4)
- Grid modernization: no smart meter infrastructure, lack of current capacity for more renewable on grid, not well tied in (we operate as an island), need for grid integration (Atlantic and other markets), lack of control of power integration, time required from concept to implementation of sustainable energy (3)

#### Key Opportunities to Explore

- Pace style programs (3)
- Carbon cap and trade/carbon pricing (4), green pricing (taxes, CO2, tariffs)
- Create local jobs (2), innovative sector giving new technologies all the time (2), post-secondary education via Acadia/NSCC (growing programs, educating workforce, specific to sustainable energy) (2).

#### Key Threats to Address

- Changing government priorities/policies (5), delays for sustainable energy integration (politics, authorities, government).
- Public opposition (4), NIMBY attitude, vocal opposition of tidal power by fishery industry and supporters
- Low cost of fossil fuels (including natural gas) creating a disincentive to move to sustainable (2)

## Tourism Sector - Participants and Key Issues

### Tourism Sector Table Participants

- Don Abbey, Valley REN Board Member (sector table co-facilitator)
- David Acton, Starr's Point Loop, Port Pub
- Genevieve Allen Hearn, The Grapevine
- Lynn Eisener, The Farmhouse Inn
- Lauren Franey, The Union Street Café
- Michael Gautreau, Sheffield Mills Eagle Watch
- Emily Haynes, Taste of Nova Scotia
- Michael Howell, Devour! Food and Film Festival
- Linda Keddy, Annapolis Valley Apple Blossom Festival
- Arminta Kennedy, Valley Business Leaders' Initiative
- Heather Leeman, Annapolis Valley Chamber of Commerce
- Kori Levy, Annapolis Valley Apple Blossom Festival
- Darlene MacDonald, Tourism Nova Scotia
- Peter Mowat, Deep Roots Music Cooperative
- Lia Rinaldo, Devour! Food and Film Festival
- Nicole Robinson, NSCC: Tourism Management
- James Schofield, Valley REN (sector table co-facilitator)
- Gordon Stewart, Restaurant Association of Nova Scotia

### Key Issues for the Tourism Sector

#### Key Strengths to Build Upon

- Developed culinary and wine industry (16)
- Quality products (5)
- Co-ordinated efforts (i.e. marketing and advertising) (4)

#### Key Weaknesses to Address

- HR shortage (20)
- Profitability (7)
- Infrastructure (5)

#### Key Opportunities to Explore

- Growing interest in culinary/experiential tourism (13)
- Industry working together (11)
- Target international tourism (8)
- Annapolis Valley as a destination (5)

#### Key Threats to Address

- Staffing (20)
- Staying relevant and exciting (9)
- Limited financial resources (7)
- Economic change (5)

## Key Themes - Inter-Sector Conversations

A number of common themes emerged from the various sector table discussion. They are outlined below.

### There's No Place Like Home

There is no denying the beauty and quality of life of the Annapolis Valley. Additionally, it is rich in natural resources of all kinds, from fertile farmland and conducive growing conditions to the world's highest tides for energy generation. The Valley is close to Halifax, with population of almost 400,000, which was mentioned as a strength by the agriculture, manufacturing, and tourism sector tables. For all of these reasons and others, such as the rich culture and artistic community, a high quality of life was reported as a strength by many.

Highlights by sector include:

#### Agriculture

- Conducive, fertile growing conditions
- Good land availability

#### ICT

- Great place to live, high quality of life

#### Sustainable Energy

- Natural resources (wind, tidal, biomass).  
Tidal power a world class resource

#### Tourism

- Proximity to attractions
- Culture (heritage and UNESCO sites, as well as arts, stories, history)
- Natural beauty and rich local resources (four season area)

### The Valley as a Local Food and Beverage Destination

Two significant, related trends in the Valley are the burgeoning local food and beverage movements. These are both becoming strong, well-developed, high-growth industries, as reported by the Agriculture and Tourism Sector tables. There is an appetite to further develop a local identity, thereby promoting the Valley as a distinct and well defined culinary region, much like New York State's Hudson River Valley<sup>1</sup>. Highlights by sector include:

#### Agriculture

- Import replacement: use local procurement policies (i.e. Provincial MASH<sup>2</sup> sector local purchasing allowance)
- Create and develop direct connections between producers and consumers
- Increase public awareness and education

#### Tourism

Grow the Valley as a culinary and beverage destination, develop a distinct region:

- Booming growth in craft beverage market (wine, beer, cider, distilleries)
- Well developed and growing culinary industry
- Agricultural heart of NS

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<sup>1</sup> Voted one of the top 20 destinations in the world for 2013, by National Geographic Traveller. [www.travelhudsonvalley.com](http://www.travelhudsonvalley.com)

<sup>2</sup> MASH sector includes: municipalities, academic institutions (i.e. universities and colleges), schools, and hospitals.

## Big Opportunity to Collaborate

There was a repeated call for the development of a collective Valley brand. This would have the added benefit of raising the individual profiles of each sector, as well as creating an opportunity from cross-sector communication and mission integration. Many sector tables also reported feeling disconnected and/or isolated internally, and lacking a collective vision or goal to drive toward, highlighting the need for the conversations that are currently being facilitated by the Valley REN.

Highlights by sector include:

### Agriculture

- Feel disconnected from each other: lack of cooperation
- Lack of unified communication with government
- No collective export strategy
- Seeking a new, bold Valley brand: made/produced in the Annapolis Valley
- Good local suppliers

### ICT

- Lack of common vision for sector
- Too much insularity, poor inter-sector communication
- Interested in collaboration with other sectors

### Manufacturing

- Need to create a Valley brand
- Good knowledge sharing

### Sustainable Energy

- Need for a single voice (i.e. industry organization) to advocate on sustainable energy

### Tourism

- Need a common Valley brand
- Need an agritourism strategy (cross sector)
- Lack of collaborative promotion as a region, both locally and outside
- Too many local individual groups, leading to duplication and a loss of synergy
- Need greater communication, cross-promotion within the sector
- Create more cross-sectoral experience-based tourism options
- Administration of tourism splintered

## Changing Perceptions Through a Shared Brand and Education

Each sector desires a higher profile locally. This could potentially be achieved collectively through a joint marketing initiative, creating a “Valley brand” that raises the profile of local products and industries, thereby giving each sector a platform for their own promotion. Sector tables also reported goals around changing sector-specific attitudes, both internally (within the sector) and externally. Both tourism and agriculture sector tables expressed a need to have their industries presented as desirable career options for students in high schools.

Highlights by sector include:

### Agriculture

- Create an increased awareness of local products and brands
- Create an interest in farming as an occupation
- Remove “can’t do” attitude

### ICT

- Adopt an innovative curriculum (primary and secondary)
- Lack of definition of the Valley as an ICT destination
- Too much complacency within the sector

### Manufacturing

- Need to raise profile of the sector

### Sustainable Energy

- Discomfort/fear of change
- Too focused on present; for cost analysis, future savings are not weighted heavily enough
- Potential for individual/community ownership
- High consumer interest in clean/sustainable energy
- Change conversation to bills vs rates (what you pay, not the rate)
- Lack of consumer awareness of energy options
- Opposition of tidal, wind, and other developments by public, as well as institutions

### Tourism

- Experiential-based tourism on the rise
- Need more public education on tourism products and experiences
- Apathy/reluctance to push the sector forward
- Not presented as a career choice
- Need more sales training for staff/managers
- No global perspective in the industry, too narrow minded/focused

## Big Opportunity to Build Critical Infrastructure

Infrastructure needs were identified in the area of transportation (road, train, and port) by multiple sectors. The absence of food processing facilities that have closed in the past number of years are being felt by the agriculture and manufacturing sectors, and have limited the production of value added food items, among other things. The Valley Community Fibre Network (VCFN) also garnered praise as a key infrastructure piece by the ICT and manufacturing sectors.

Highlights by sector include:

### Agriculture

- Lack of infrastructure (i.e. food processing)
- Use of technology good

### ICT

- Lack of broadband throughout the Valley
- VCFN

### Manufacturing

- VCFN and high speed capacity
- Loss of food processing infrastructure
- Lack of transportation infrastructure

### Sustainable Energy

- Insufficient infrastructure (ports) for tidal power

### Tourism

- Lack of signage for local attractions
- Transportation
- Lack of varied accommodations; tired product
- Entry points not supported in province

## Post-Secondary Education: Key Assets

Every sector table recognized the great strengths and opportunities that Acadia and NSCC represent, largely in terms of research capacity, high-quality, sector-specific training, and the proximity of a young, talented labour pool that comes as a result. Efforts should be made to forge even closer relationships with these institutions, and where possible to highlight the mutually beneficial nature of these partnerships. Sectors should strive to be accessible and cooperative, making it as smooth as possible for students and faculty to take advantage of things like co-op placements and real-world research opportunities.

Highlights by sector include:

### Agriculture

- NSCC and Acadia research centres

### ICT

- Capitalize on opportunities to work with co-op students
- Acadia and NSCC research centres
- Inter-disciplinary ICT collaboration: optimize agri-tech via NSCC/COGS, Acadia research, training and technology

### Manufacturing

- Explore connections with Acadia, NSCC further

### Sustainable Energy

- Draw on the experience, research, energy, and communities of NSCC and Acadia

### Tourism

- Positive seasonality influence of Acadia (fall and spring surge)
- NSCC tourism department

## Human Resources: A Strength and a Weakness

Positive comments were made about sector workforces, particularly within agriculture, manufacturing, and tourism. Credit was also given to an engaged community at large. Acute labour shortages were cited by representatives from the agriculture and tourism sectors, who are also worried that jobs in farming and tourism are not being encouraged in schools (if not in fact discouraged). Workforce needs were also expressed by the ICT sector table; they have access to a deep, skilled labour pool of Acadia and NSCC grads, but many are leaving the area upon graduation for larger urban centres. The need for a more diverse workforce was also mentioned by the ICT sector table, as they have observed a lack of women employees.

Given the attractive lifestyle of the Valley, participants suggested that a focus on attracting/retaining skilled labour could have a significant impact. One potential option would be to collectively launch a “live and work in the Valley” campaign, to be jointly administered and funded by all sectors.

Highlights by sector include:

### Agriculture

- Passion within the industry
- Knowledgeable, caring, successful people in the sector
- Opportunity to work with O2 programs in high schools
- Interest in working with Syrian refugees
- Aging workforce
- Labour shortage

### ICT

- “Brain-drain” to Halifax and other urban centres
- Talent pool from NSCC and Acadia not staying, but big opportunity if they can be attracted to stay
- Employee/student retention opportunities (high quality of life in the Valley)
- Limited diversity (i.e. lack of women)

### Manufacturing

- Good workforce of long-term employees
- Lifestyle of employees (attractive)
- Local recruiting: quality HR being drawn out of region
- Engaged community

### Sustainable Energy

- Young people looking for work in responsible industries

### Tourism

- HR shortage
- Enthusiastic leadership, friendly sector
- Rich talent pool
- Diverse workforce
- Great community engagement and support
- Diminishing workforce for service/kitchen jobs
- Lack of volunteers (over-extended base)

## Engaging with Government

Generally, the government was not shown to be as communicative or collaborative as sector representatives had hoped. Many cited restrictive policies and regulations, some particular to their area or activities. Comments highlighted the ongoing importance of governments at all levels engaging in communication with sector representatives when creating policies and frameworks, in order that they would enable the growth and success. Multiple sector representatives suggested creating collective bodies, such as industry associations, to present a strong, unified voice to government departments.

Highlights by sector include:

### Agriculture

- Export focus
- Restrictive policies slowing business growth
- Lack of communication with ag sector

### Manufacturing

- Little cooperation from provincial government in helping to satisfy regulations (“You’re on your own”)
- Need fair import competition policies

### Sustainable Energy

- Inconsistent/variable government policies and attitudes toward sustainable energy slow integration significantly
- Federal climate change policies: more opportunities?
- Federal support, local procurement (Dept. of Defense in Greenwood)
- Municipalities as partners
- NS Power posing significant opposition

### Tourism

- Lack of participation and funding from all levels of government. Gov’t unwilling to invest in what is needed
- Too much red tape when starting businesses

## Exporting and Import Replacement: It's Not Either-Or

Most sectors mentioned a small local market as a barrier. Faced with this reality, sectors need to work together to maximize the market by purchasing from each other wherever possible and encouraging the “buy local” trend.

Exports were cited as a desirable route for growth for agriculture and manufacturing, which along with tourism are being buoyed by a lower Canadian dollar. This focus should not exclude a focus on import replacement: when coupled with “buy local,” marketing this concept is another way to maximize sales in a small market, both at the retail and wholesale levels.

Highlights by sector include:

### Agriculture

- Lack of support, resources. Small market
- Strong exports
- Barriers to export growth
- Good supplier hub

### Manufacturing

- Strong exports

- Looking to international sales growth
- Small local market

### Sustainable Energy

- Small local market

### Tourism

- Facing regional and global competition

## A Need for Better Access to Capital

Limited access to capital and an insufficient variety of sources, especially for specific projects, were mentioned across all sectors. Energy prices were mentioned as an issue by the manufacturing and agriculture sectors. The sustainable energy table suggested that more consistent energy prices could be achieved with a one-time capital investment in generation infrastructure. If sustainable energy subsidies, patient capital, and/or CEDIFs were secured, the agriculture and manufacturing sectors could quickly become clients of the sustainable energy sector.

Highlights by sector include:

### Agriculture

- Poor access to capital
- Opportunities with community investment and CEDIFs
- High cost of energy
- Interest in sustainable energy

### Manufacturing

- Cost of business: energy, organization of region, medical notes, logistics, tax rates, WCB

### Sustainable Energy

- One time capital investment to make the cost of energy predictable and consistent
- Limited funds for tidal power development
- Insufficient commercial investment/lending
- Limited financing options
- Cost savings: prices/costs falling significantly; falling energy storage costs
- Return on investment (long-term)

### Tourism

- Lack of money for Annapolis Valley tourism promotion
- Need better reporting on the multiplier for tourism
- Profitability weak
- Limited financial resources

## Environmental Concerns

An awareness of the environmental impact of their activities was noted across multiple sectors, as was a desire for greater efficiency in use of resources. The effects of climate change are also top of mind for participants, given the reliance by all sectors on the Valley's unique ecosystem and natural resources.

Highlights by sector include:

### Agriculture

- Food waste management, carbon offsets
- Climate change, pollution, bees, water

### Manufacturing

- Looking for more efficient growth of land-based activities
- Opportunity to create unique products based on local primary production

### Sustainable Energy

- Environmental impact (both positive and negative)
- Conflict with ocean resources: some tidal technology may have negative impacts on ecology and resources
- Rising coastal water levels
- Energy efficiency programs and supply chain
- Carbon cap and trade/carbon pricing, green pricing (taxes, CO<sub>2</sub>, tariffs)

## Appendix A: Session Outcomes - Other Identified Issues

The following lists include all the remaining issues that were identified by the various sector tables, but which were not short-listed as being of the highest-priority.

### Other Issues for the Agriculture Sector

#### Strengths to Build Upon - Agriculture

##### Capacity (11)

- Abundance of water; high quality soil; excellent land base

##### People (8)

- Skilled, knowledge-based
- Knowledgeable people
- People who care
- Successful agricultural entrepreneurs are growing their farms
- Existing farmers and producers
- Strong local market and proximity to Eastern Seaboard
- Support Local trend
- Increased options to connect the public to local food
- Growing public awareness and buy-in

##### Resources (6)

- Acadia and NSCC research centres
- Infrastructure
- Perennia
- Farmworks
- Knowledge base/research
- Small manufacturers talk a lot with each other: Meadowbrook, Pie R Squared, Valley Flax, Fox Hill, etc.

##### Reputation (5)

- Global image
- Good reputation
- Quality

##### Diversity (4)

- Diverse product mix to draw people to the area and allow people/business to work together
- Diversity of commodities

##### Location (2)

- Geographic location: weather
- Closeness to markets

## Weaknesses to Address - Agriculture

### Communication (4)

- Connections: knowing what else is happening in the sector
- Communication
- Signage
- Isolation: farmers increasingly separated from customers
- Marketing support for new products

### Resources and Support (3)

- Lack support for diverse communities
- Immigrant infrastructure
- Lack of infrastructure
- Community infrastructure
- Lack of cleaning facilities for human grade standards
- Lack of internet services
- Lack of information on sharing equipment, renting equipment, or rent to own

### Distribution (1)

- Lack of database of current companies exporting
- Small population, small local market
- Proximity to markets
- Inability of government policies to evaluate on individual business need to allow growth
- Distribution of products outside region
- Lack of local distribution system
- Lack of mentoring opportunities in export areas to help small businesses

### Policy and Regulation

- Building inspectors
- Government and policy
- Provincial government focus on export over local or in balance with local

### Farm Scale

- Consolidation: farms increasingly larger; emphasis on servicing supermarkets
- Scattered small blocks of land
- Scale efficiencies
- Ability to scale to meet market demand

### Labour

- Awareness of this as a career option
- Access to local dependable labour
- Increasing cost of wages
- Difficulty transitioning farms to younger generation
- Capital
- Access to capital to start farming: a certain scale is required which limits ability to initiate funding
- Cost of entry
- Lack of one direction shipping and delivery to Valley stores and to Halifax

### Food Security

- Community food insecurity
- Food (in)security: need for increasing local production and greater access
- Indigenous food insecurity
- Poor food in schools and hospitals

### Finances

- Lack of access to funding for business
- Lack of operating access
- Energy
- Energy intensive

### Supply management

## Opportunities to Explore - Agriculture

### Collaborate and Export

- Consolidate products to get to market
- Collaboration to gain access to markets: shelf space, global
- Exports

### Local Food

- Procurement policies of institutions
- Tourism
- Rising imported food costs
- Renewed interest in local production
- Learning to export (from small, local start)
- Feed ourselves again
- Serving the 95% of people in NS not involved in local food consumption
- Opportunity to increase the amount of food to replace imports
- New, bold Valley logo: made, produced in the Annapolis Valley
- Direct relationships between producers and consumers: farmers markets, CSAs, etc. (also a strength)
- Regional food hubs
- Underutilized land
- Replacing some of the 92% of foods we import
- Increasing public awareness about the value of sustainable, clean, local food
- Agriculture awareness
- Increased interest in where food comes from

### People and Local Trends

- Having O2 students from high schools work on farms
- Syrian refugees and families
- Changing climate
- Speed dating for businesses
- Aging population as a market
- Renewable energy
- Artisanal agriculture (small farms, small processors)

- Organic, small-scale, due to increased customer interest
- Local online marketplace
- Value adding
- Expanding niche markets

#### Systems, Research and Education

- “Age of information” may be able to support new ways of producing and distributing food like never before
- Infrastructure development
- Commercial kitchens
- Agriculture and Agri-Food Canada research station infrastructure
- Grow entrepreneurs in the industry
- Structure the social system to support skill and work
- More cooperation and collaboration
- Education and food literacy

#### Innovation

- Improved production efficiencies
- Agriculture waste products
- Food waste management: carbon offsets, food production, distribution, other value adds (i.e. pet food)
- Innovative community

### Threats to Address - Agriculture

#### Government Regulations (20)

- Red tape
- Need better understanding of government regulations
- Agriculture activists
- Misinformation and media

#### “We’ve done it this way for 30 years” attitude (12)

#### People (7)

- Aging workforce
- The way wages are determined: minimum not based on ability to: earn, or ability to pay
- Education that restricts hands on skill development
- People moving to rural areas are not prepared to live next to a farm. Ideals become conflicts at times

#### Urban Development (5)

- Urban encroachment
- Urban sprawl
- Farm land being developed not preserved

#### Environment (3)

- Bees and disease control
- Pollution
- Changing climate: threatens local production
- Water

Import/Export (3)

- Cost increases
- Supply management
- Trade agreements
- No industry export strategy
- Commodity pricing resulting from lower cost imports
- External competition
- US Dollar
- Sending “crappy crops or products to NS market to get rid of them”
- Imports

Not having a discussion of reforming quota system while other provinces are (3)

Loss of manufacturing (3)

Cost barrier to entry (2)

- Agriculture land prices climbing out of reach of young farmers
- Land values
- Difficulties for new farmers to enter agriculture

## Other Issues for the ICT Sector

### Strengths to Build Upon - ICT

- Acadia/NSCC: access to young people and research facility via Acadia. Acadia-NSCC machine learning talent pool (13)
- Acadia/NSCC based in community
- Community engagement
- Very strong technology present in P-12 AVRSB schools
- Access to broadband providers in larger centres
- Valley Community Fibre Network
- Lower cost of living. Great place to live and grow
- Imagination and work ethic
- International reach with IBM/Hitachi in data analytics to serve oceans, agriculture, tourism, etc.
- Proximity to Halifax

### Weaknesses to Address - ICT

- Limited access to provincial/federal purchasing
- Access to local, experienced labour. Awareness of opportunities for students. Pull of talent to urban regions. Never ending cycle of attracting talent and retaining them
- Funding for sector growth, state of rural broadband. High speed internet to rural businesses
- Lack of experience among teachers/admin around ICT. Industry is not well known in schools.
- Lack of common vision for sector in NS.
- Insularity
- Lack of realism
- How we define the Valley as an ICT destination

### Opportunities to Explore - ICT

- Community leverage of Valley Community Fibre Network (VCFN)
- Co-op students
- Adoption of an innovative curriculum
- Employee retention
- Capitalizing on existing community
- Inter-disciplinary ICT collaboration: optimize agri-tech via NSCC/COGS, Acadia research, training and technology
- Export services: ICT is (or can be) borderless

### Threats to Address - ICT

- Lack of rural broadband throughout the Valley (5)
- Commodity services (i.e. Amazon, web.com, CDW). Too much web development. Students leave the area
- Government compensation packages (1)
- Attracting and keeping people: shrinking population, brain-drain to Halifax and other urban centres
- Complacency (2)

## Other Issues for the Manufacturing Sector

### Strengths to Build Upon - Manufacturing

- Workforce (long term employees)
- Lifestyle of employees
- Flexibility to level up
- Nova Scotia brand
- Expertise (Acadia U)
- Big employers
- Strong exports sector
- Receptivity of leaders to vision
- VCFN infrastructure
- High speed internet capacity
- Lower wage rates (relative to the rest of Canada)

### Weaknesses to Address - Manufacturing

- Cost of business: NS Power, organization of region, medical notes, logistics, tax rates, WCB
- Business size
- Pressure on government resources to finance with big money
- Cash flow
- Loss of food grade infrastructure and cost to rebuild
- No federally inspected meat facility for pork
- Interprovincial trade in business with CFIA regulations without Federal inspection

### Opportunities to Explore - Manufacturing

- International growth
- More efficient growth of land-based activities, esp. Agriculture
- Global demand for highly-connected regions
- Growing need
- Exchange rate (U.S.)
- Different supply chains
- Local partnerships
- Local recruiting
- Unique products based on local primary production

### Threats to Address - Manufacturing

- Local market size
- "Rising tide" of other high speed areas
- Quality HR being drawn out of region
- Little cooperation from provincial government in helping to satisfy regulations ("You're on your own")
- Low manufacturing cost countries
- Time

## Other Issues for the Sustainable Energy Sector

### Strengths to Build Upon - Sustainable Energy

- NS natural resources: wind resources, tidal power, strong marine industry in province (6)
- History of success with in tidal power in Annapolis (5)
- Biomass (by product availability). Innovacorp and Perennia are potential resources (5)
- A one time capital investment can make the cost of energy predictable and consistent (not subject to global market and prices) (3)
- Location: close to HRM, but not too close
- Mass desire to implement sustainable energy (1)
- Some sustainable options have relatively low capital intensity. Don't necessarily need high capital to get started for some projects
- Sustainable - many don't require a "fuel" input
- Innovacorp programs (1)
- Better for people and the environment
- Experienced "returners" with knowledge
- Supportive governmental regulations require a facilitator

### Weaknesses to Address - Sustainable Energy

- People not comfortable with/scared of change
- Limited funds and insufficient infrastructure (i.e. ports) for tidal power development
- Size of local market
- Regulations: by-laws prohibiting growth
- Reliance on diesel and gasoline to power cars, alternatives too costly
- Return on investment
- Distance to Halifax market
- Cost analysis (future savings not weighted heavily enough)
- Lack of commercial investment/lending
- Financing options
- Talking with politicians about options. Need for a single voice (i.e. industry organization) to advocate on sustainable energy
- NS Power not as supportive of renewables
- Disparity in incomes and needs: high needs, low income
- First Nations consultation
- Environmental impact

### Opportunities to Explore - Sustainable Energy

- Federal climate change policies: more opportunities?
- Business development: development of supply chain manufacturing
- Tidal power a world class resource: world's highest tides (predictable energy generation)
- Increase production in time to switch to sustainable sources (replace fossil fuels)
- Atlantic region export opportunities
- First Nations Consultations
- Potential for individual/community ownership
- High consumer interest in clean/sustainable energy
- Electrification strategy (long-term)
- Change conversation to bills vs rates (what you pay, not the rate)

- Energy security
- Cost savings: prices/costs falling significantly; falling energy storage costs
- Leadership by example
- All regions of NS due to natural resources
- Supportive federal government policies?
- Federal support, local procurement (Dept. of Defense in Greenwood)
- Municipalities as partners
- Young people looking for work in responsible industries
- Use NSCC students' ideas
- Knowledge-based businesses

### Threats to Address - Sustainable Energy

- Conflict with ocean resources: some tidal technology may have negative impacts on ecology and resources
- Ontario FIT-fueled businesses
- Tidal power: challenging flow environment, very expensive
- Rising coastal water levels
- First Nations opposition
- NS Power (x3)

## Other Issues for the Tourism Sector

### Strengths to Build Upon - Tourism

#### Location

- Proximity to Halifax/airport (3)
- Not too spread out; proximity to attractions (2)

#### Culture

- Traditional events (1)
- Artists/authors/musicians galore! (1)
- Historical sites (1)
- UNESCO World Heritage Landscape (Grand Pre) (1)
- Our history, our stories
- Culture and heritage growth

#### Experience-based Tourism

- Cluster of amazing, market demanded experiences
- Shift to “experience” vs. material
- Variety of unique experiences (2)
- Established tourism sites and events to build on (i.e. birthplace of hockey)
- Warm and fuzzy memories for NS folks

#### Geography and Region

- Bay of Fundy, Cape Split (1)
- Dynamic, diverse landscape
- Natural beauty (four seasons)
- Rich local resources (Valley, ag. and food, wineries, Bay of Fundy)
- Safe place to travel (i.e. no vaccinations needed to get here)

#### Human Resources/Quality of Service

- Willingness to collaborate
- Our people are so friendly and helpful
- Predictable and reliable
- Enthusiastic leadership
- “Owner’s commitment” to service
- Talent pool
- Diverse workforce and experience
- Passionate producers
- Technology is smart in NS: gets the word out

#### Industry

- Booming growth in craft beverage market (wine, beer, cider, distilleries)
- Destination
- Growing culinary industry
- Agricultural heart of NS
- Range of products

### Community

- Engaged community
- Community support and involvement (2)
- Community shared values

### Local and Global Trends

- Lower Canadian dollar
- East Coast considered as trendy (by the rest of Canada) (1)
- Established programs to build tourism professionals
- Growth is on a trajectory
- Positive seasonality (i.e. Acadia University, with visitors in the spring and fall)

## Weaknesses to Address - Tourism

### Infrastructure

- Lack of signage for local attractions
- Transportation costs
- Lack of transportation options
- Lack of varied accommodations
- Tired product (i.e. accommodations) (3)
- Entry points not supported in province

### Lack of Collaboration

- Attitude: companion companies that act like competitors (2)
- Working toward a common goal
- No common Valley brand (3)
- Lack of collaborative promotion as a region
- Cooperation and coordination
- How to attract tourists? (who does what)
- Lack of local promotion (1)
- Too many local individual groups, leading to duplication and a loss of synergy (1)
- Who is our customer in the short term? (now) In the long term? (wish)

### Finance and Economics

- Lack of funding
- Lack of government funding
- Participation lacking from all levels of government
- Lack of money for Annapolis Valley tourism promotion (3)
- Multiplier effect hard to determine for tourism economies
- Removing economic roadblocks
- What is economic development? (Chamber of Commerce, Valley REN, municipalities, provincial government)

### Lack of Communication

- Need more public education on products and experiences
- Stronger communication of ideas (1)
- Small area to promote globally
- Promotion/advertising: need to broaden focus (i.e. South Shore, Cape Breton) (1)
- Market share
- No agritourism strategy (1)

## Valley REN Sector Table Workshop: SWOT Analysis Report from Common Good Solutions

- Is there enough communication to local businesses like restaurants when major events are happening so that these businesses are equipped to serve event attendees?
- Are local businesses (like B&Bs) promoting local enterprises to their customers or on their websites? (1)
- Networking access sectors

### Competition

- Competition (markets)
- Competition from other tourist dependent areas in close proximity
- Globalization of industry
- Who knows NS globally?--not a sexy destination

### Attitude

- Apathy (1)
- Reluctance to push issues for success (1)
- Lots of talk about issues but no action
- Remove the box; there is no box (thinking/operating outside of the box)
- Look at what other regions have done and are doing

### Human Resources

- Diminishing workforce in service/kitchens (4)
- Lack of volunteers (6)
- Wage discrepancies
- No support as a career choice
- Labour
- Training and education

### Marketing and Sales

- Lack of knowledge of how to sell/close the sale
- How do we know what they want?

### Local Trends

- Seasonality
- Aging population
- Change in the types of tourism desired--industry change
- Too much red tape (especially to open a small business) (1)

## Opportunities to Explore - Tourism

### Strong Value to Travel to NS

- Proximity to USA and favourable exchange rate
- Traveller fear in US: Canada-NS is safe

### Industry Collaboration

- Get on "G Adventure Tours" agenda
- Build upon what can be done in the Valley
- Shift toward wanting to "experience": agriculture, landscape, cultural, exposure/learn, view/history, taste/learn
- Conferences for national organizations (less expensive to host here)

- Cross-sectoral activities: experience and learning and culture
- Turn aging population into ambassadors
- Linkages with Visitors' Centres
- Create revenue generating activities
- Create updated events
- Speed dating to connect businesses
- NSCC Tourism Department

#### Small-scale Business

- Local tour company (food tours, drink tours, culture tours, history tours)
- Small-scale experiential tourism opportunities, low financial barrier to entry (i.e. Blue Beach Fossil tours, corn maze)

#### Culinary Tourism

- Culinary and beverage
- Grow the Valley as a culinary destination (1)
- Develop a distinct region (3)
- Agro-tourism (farm tours, artisanal food tastings, corn mazes, etc.)
- Destination with outdoor activities
- Celebrating traditional regional food traditions
- Product development
- Artisanal food and beverage production (1)

#### Development Opportunities

- Cruise ships
- Developer could build varied accommodations

### Threats to Address - Tourism

#### International

- Travellers fear flying, etc.
- Global economy, Canadian dollar
- No global perspective (in the industry), too narrow minded/focused

#### Regional Competition

- Other events
- Oversaturation of similar experiences

#### Things Outside Our Control

- Weather
- Global political climate

#### Human Resources

- Board turnover
- Administration of tourism splintered (2)
- Over-extended volunteer base (2)
- Educated human resources

### Money

- Bureaucracy unwilling to take bold steps (2)
- Unwilling to invest in what is needed (4)
- Lack of corporate sponsorship (1)
- Access (costs) (1)

### Innovation/New Products

## Appendix B: Full Session Participant List

### Agriculture Sector Table Participants

- Linda Best, FarmWorks Investment Co-operative
- Lance Bishop, Wild Mountain Farms
- Keltie Butler, Farmers' Markets of Nova Scotia Co-operative
- Sean Cochrane, Nova Scotia Business Inc. (NSBI)
- Tom Cosman, Cosman and Whidden Honey
- Jodi den Haan, den Haan Greenhouses
- Danny Dill, Dill Family Farm
- Duncan Ebata, Food Community Builder and Marketer
- Peter Hicklenton, FarmWorks Investment Co-operative
- Emily Konrath, Valley REN (sector table co-facilitator)
- Brian MacCulloch, Department of Agriculture
- Allison Maher, Dempsey Corner Orchard
- Coby Milne, Valley REN Board Member (sector table co-facilitator)
- Gary Morton, Morton Horticultural Associates
- David Newcombe, Cornwallis Farms
- Kyla Pierik, Perennia
- Ben Roy, Farm Credit Canada
- Av Singh, Centre for Small Farms
- Alan Stewart, Horton Malt Ridge
- Gillian Wesley, Farmers' Markets of Nova Scotia Co-operative
- Judy Rafuse, Annapolis Valley Chamber of Commerce
- Margie Lamb, Meadowbrook Meat Market
- Wendy Rodda, Valley Flax Flour

### ICT Sector Table Participants

- Mike Caplan, Refresh Annapolis Valley
- Terry Dalton, iValley
- John Frost, PrecisionHawk
- Scott Hearn, Valley REN Board Member (sector table facilitator)
- Shameer Iqbal, Singolar
- Dr. Jim Retallack, Acadia Management Group Inc.
- Paul Richards, Innovacorp and BioEnterprise (Maritimes)
- Mark Richards, Annapolis Valley Regional School Board
- Wayne St. Amour, NSCC: IT Campus
- Mike Suhonos, Computerized Business Solutions
- Hayly Thackeray, Computer Science Society at Acadia
- Bob Thomas, Progeny Software

## Manufacturing Sector Table Participants

- Barry Gander, Valley REN Board Member (sector table facilitator)
- Heather Lunan, Pie R Squared
- Chad MacDonald, CKF
- Shannon MacLean, Nova Scotia Fisherman
- Andrew Schnare, Xerium
- Howard Selig, Valley Flax Flour

## Sustainable Energy Sector Table Participants

- Andrew Bagley, Nova Solar Capital
- Shawna Eason, Nova Scotia Department of Energy
- Kelly Ells, Valley REN (sector table facilitator)
- Marcus Goodick, Enviro Culture
- Christine Heap, Nova Solar Capital
- Dr. Anna Redden, Acadia Tidal Energy Institute
- Rob Sedgwick, Sage Energy
- Scott Skinner, Clean Foundation

## Tourism Sector Table Participants

- Don Abbey, Valley REN Board Member (sector table co-facilitator)
- David Acton, Starr's Point Loop, Port Pub
- Genevieve Allen Hearn, The Grapevine
- Lynn Eisener, The Farmhouse Inn
- Lauren Franey, The Union Street Café
- Michael Gautreau, Sheffield Mills Eagle Watch
- Emily Haynes, Taste of Nova Scotia
- Michael Howell, Devour! Food and Film Festival
- Linda Keddy, Annapolis Valley Apple Blossom Festival
- Arminta Kennedy, Valley Business Leaders' Initiative
- Heather Leeman, Annapolis Valley Chamber of Commerce
- Kori Levy, Annapolis Valley Apple Blossom Festival
- Darlene MacDonald, Tourism Nova Scotia
- Peter Mowat, Deep Roots Music Cooperative
- Lia Rinaldo, Devour! Food and Film Festival
- Nicole Robinson, NSCC: Tourism Management
- James Schofield, Valley REN (sector table co-facilitator)
- Gordon Stewart, Restaurant Association of Nova Scotia