


Tourism InnovatioNS Day 2015



Goal for Today

Provide you with information that can help you grow your business and tourism in your region

Agenda

1. OneNS 
 - a) Crown Corporation – what does this mean?
 - b) Context
 - c) Roles and Focus
2. 2015 Plans
3. What's next?
4. Questions

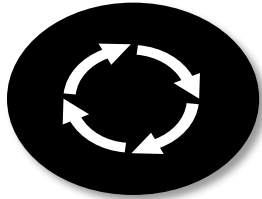
OneNS



OneNS – Call for Action



Rally around a ***new vision*** and ***strategies*** to meet economic and population challenges



‘Business as usual’ and ‘politics as usual’ will not ***overcome these challenges***



Need to ***change old attitudes*** that limit our capacities to come together for a common cause

Goal 14: Tourism Expansion

As Nova Scotia's leading source of service sector exports, gross business revenues from tourism will reach

\$4 billion

(approximately double the current level)

Crown Corporation

- This change clarifies roles and clears the way for businesses to invest, produce, compete and grow.
- As a corporation we will have more autonomy, and more decision-making authority, e.g. how we allocate and spend our budget.
- Details will come in legislation, to be introduced in the spring sitting of the Legislature.

Context



World View



- Tourism is one of the largest and fastest growing economic sectors in the world – 5% growth in 2013
- Arrivals and revenue growing at the same pace on average
- 528 million arrivals in 1996, 1087 million in 2013, 1800 million by 2030
- Expected increase 3.3% per year through 2030 (Advanced economies 2.2%, emerging destinations 4.4%)
- 80% of world's arrivals originate from same region

“Leading Canada and the World Through the 21st Century Six Opportunities for Canada”



Dominic Barton
Global Managing Director
McKinsey and Company

1. Growing consumption from emerging markets
2. Natural Resources
3. Agriculture and Food
4. Education
5. Technology and Innovation

6. Tourism

McKinsey & Company

Case Study - Cambodia

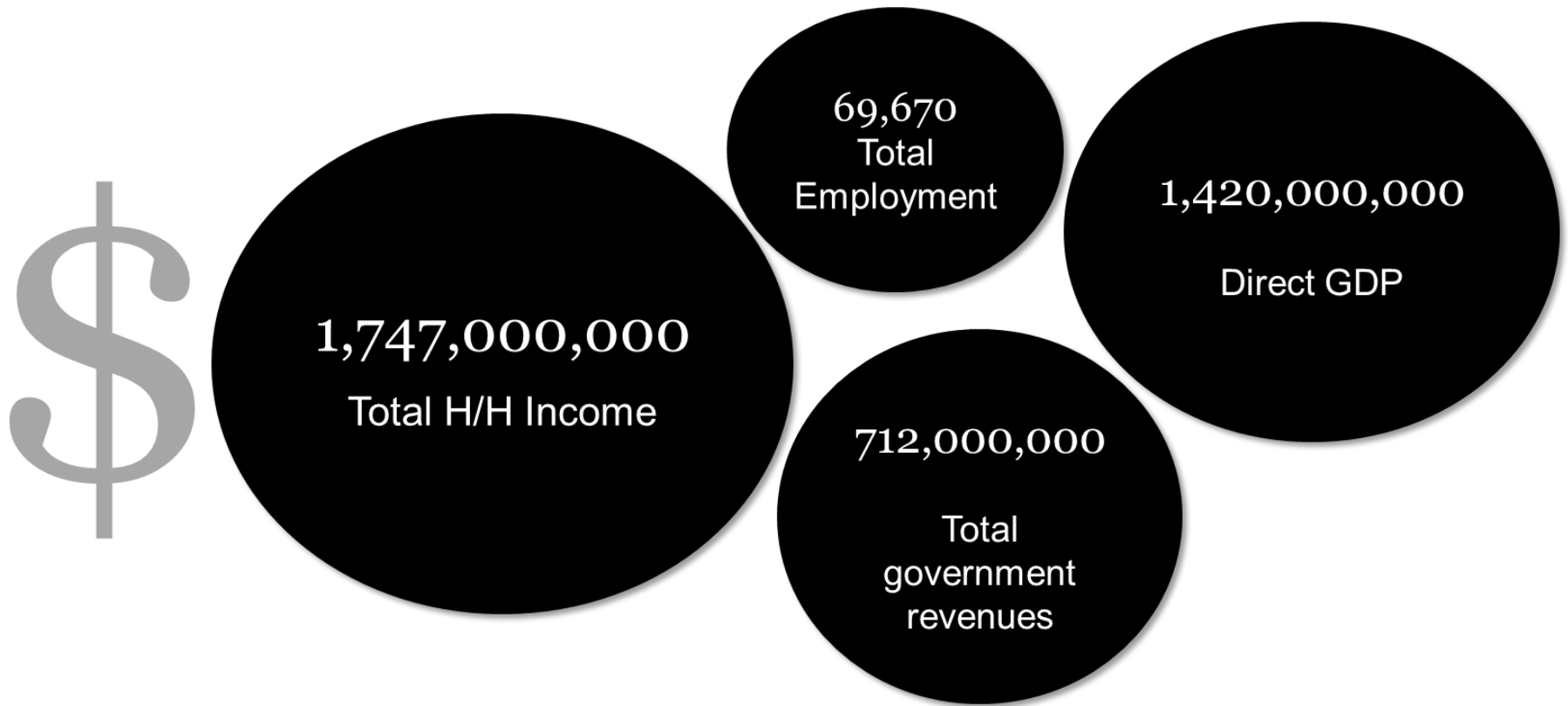


	2003	2013
International Arrivals	701K	4.2M
Average length of stay	5.5 days	6.75 days
Hotel occupancy	50%	69.5%
Receipts (USD)	\$347M	2,547M
Arrival Type		<ul style="list-style-type: none"> 47.2% air (19.5% Phnom Penh, Siem Reap/Angkor 27.6%) 51.2% land 1.7% waterway
Siem Reap	<ul style="list-style-type: none"> 551K passengers 12K aircraft movements 	<ul style="list-style-type: none"> 2,663K passengers 31.5K aircraft movements 36 international airlines
HIAA		<ul style="list-style-type: none"> 3,585K passengers 83K aircraft movements



Source: Tourism Cambodia and HIAA Annual Reports

What Would \$4b Mean for NS?



We must

- **Refresh Nova Scotia's tourism strategy**
- Sing from the same hymnbook
- Embrace tourism as a key strategy to aid in tripling exports
- **Define Roles**

Roles & Focus



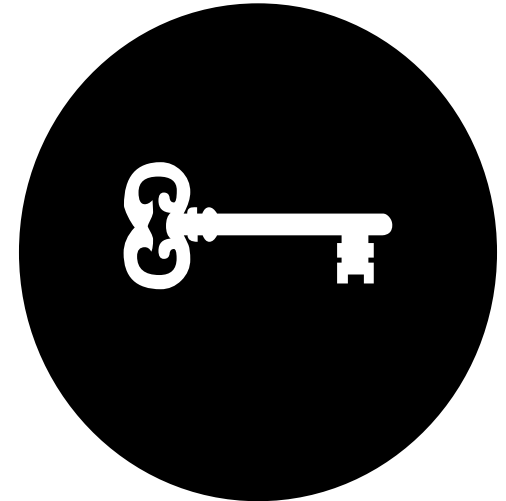
NSTA Role



Attract **first-time visitors** from markets of highest return



Focus on **world class experiences**

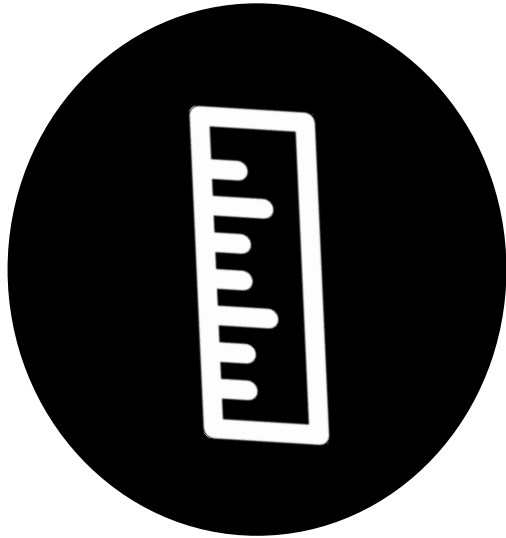


Focus on **private sector initiative** that can attract first time visitation

Shift in Focus

- Focus on **marketing** as the core business
- Invest in markets of **highest return**
- **Stop** being an **operator**
- **Align resources** against strategic objectives
- Launch **China Strategy**
- Invest in **air**
- Feature only **world class experiences** in marketing
- Build Nova Scotia's **tourism confidence**

Government's Role

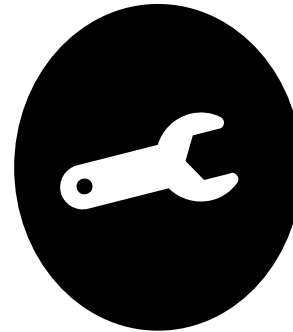


Align policy agenda in support of goal

Thereby informing...



Community economic development



Attraction of inward investment



Infrastructure investment

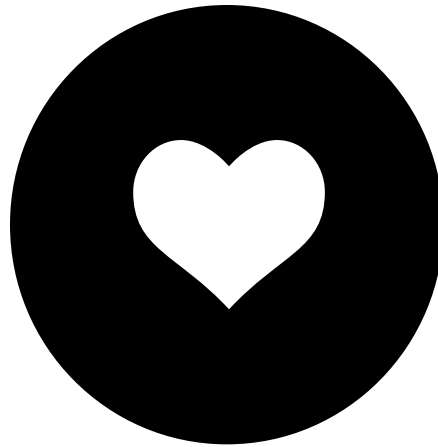
Shift in Focus

- Embrace **\$4B goal** at the top
- Launch **'all of gov't'** approach
- Align **policies and programs** in support of goal
- Explore potential for establishing Nova Scotia as a worldwide **centre of excellence** for hospitality training
- Launch **China strategy**

Industry's Role?



Close the sale – pre-trip and during trip



Drive **repeat visitation** by exceeding visitor expectations



Invest in product



Deliver world class experiences

Shift in Focus

- Deliver **high quality experiences** / exceed expectations
- **Upsell** and build referral
- Measure success against revenue generated from **repeat visitors**
- Prepare to welcome **visitors from China**

Communities' Role



Partner with industry
to deliver destination
development and
marketing



Visitor servicing

Shift in Focus

- Lead the delivery of **visitor servicing** with focus on driving visitor expenditures
- Develop strategies to attract **inward investment**
- Align **community economic development** efforts in support doubling revenue goal
- Drive **visitation** of resident **Nova Scotians**
- **Prepare for** visitors from **China**

Doing the Math - *DRAFT*

Market	Incremental Visitors	Total Visitors	Total Revenues
ATL	-30,000	959,500	\$455,350,000
Quebec	20,000	107,200	\$89,915,000
Ontario	40,000	480,500	\$465,992,000
West	62,000	216,300	\$375,364,000
New England	36,000	93,800	\$78,384,000
Mid Atlantic	72,000	100,300	\$118,713,000
Other US	100,000	184,100	\$286,620,000
International	240,000	312,700	\$859,211,000
NS same day visitors, cruise, etc.	--	--	\$1,293,607,000
TOTAL	570,000	2,454,500	\$4,023,155,000

2015 Plans



Guiding Principles - 2015

- Reduce duplication, improve efficiencies and make strategic investments to support the tourism brand.
- Reallocate budget to invest more money into other strategies and consumer marketing to bring more visitors to our province.

Single-minded focus:

Attract more first-time visitors, who stay longer and spend more.

2014 Market Performance

Market	2013/2014 Growth
BC	4.7%
Alberta	14.4%
Ontario	1.9%
Quebec	6.0%
New England	18.5%
Atlantic	-2.6%

2014 Performance

- **Visitation:** Increased by 1%
 - road was -2%
 - air was +7%

- **Accommodations and Revenue Impact:**
 - Increased by 3%
 - \$13M



Largest
y/y growth
since 2002

2014 novascotia.com

- Visits 2,749,050 (+22%)
- Clicks to Operator Websites 219,639 (+91%)
- Organic Search 1,452,505 (+17%)
- SEM Clicks 229,113 (+127%)

2015 Target Markets

Canada

Toronto, Ontario
Montreal, Quebec
Rest of Canada (National buy)

United States

Northeastern United States

Overseas

United Kingdom
Germany

2015 Media Objectives

- Create top-of-mind consideration during awareness phase.
- Optimize campaign during conversion phase.
- Drive qualified traffic to NovaScotia.com.

2015 Media Strategy

Maximize the value of media spend through optimization and persona-based media targeting.

Awareness

Mass media and digital to inspire all personas.

Conversion

Frequency and data driven media to motivate onsite engagement and action.

Campaign Evolution - 2014

SPECTACULAR DISTRACTIONS ARE PAR FOR THE COURSE.

Take yourself there

When you're craving an authentic escape, head to Cape Breton Island, with its breathtaking history and some of the most beautiful scenery in Canada. You'll be surprised that it's barely 100km inland, although the weather is just as dramatic. This rugged coastline is nestled along the Cabot Trail, a winding access highway that winds its way from east to west with world-renowned sea vistas.

NOVA SCOTIA
1-866-563-6600 • NOVASCOTIA.COM

WHEN THE TIDE IS YOUR GUIDE THERE IS AN OCEAN OF POSSIBILITIES.

Take yourself there

EXPLORE KE-BIAKON MULTISPORT TOUR \$189⁰⁰ (per person)

10K1, KAYAK, WHALE WATCH THE CAPE BRETON HIGHLANDS \$330⁰⁰ (per person)

NOVA SCOTIA
1-866-563-6600 • NOVASCOTIA.COM

NOVA SCOTIA IS AN AWAY PLACE TO VISIT. START EXPLORING NOW.

WHAT IS TIDAL BORE RAFTING?

RIDING 100 BILLION TONS OF RACING TIDE

GET ALL THE POWER AVAILABLE IN A TRUE NOVA SCOTIAN

MOMENTS YOU CAN'T DESCRIBE CAN LEAD TO THE BEST CONVERSATIONS.

Take yourself there

Summer weekend breaks from the ocean, made working vacations from our beautiful valley farms, and award-winning wines. From hot riverside, hot spring, hot waterfalls, hot restaurants, hot pubs, or hotspots at outdoor dining tables. You'll be in a hot spot, because the only hot in Atlantic Canada is the heat of the moment. Discoveries in the moment of time you have in question.

NOVA SCOTIA
1-866-563-6600 • NOVASCOTIA.COM

REASON #27 HALIFAX WATERFRONT

For a taste of our award-winning waterfront, you'll find us at the waterfront.

Learn more about the Halifax Waterfront

Take yourself there

NOVA SCOTIA
1-866-563-6600 • NOVASCOTIA.COM

GRADUATE WITH A DELICIOUS GRADE

SEAFOOD COOKING SCHOOL PACKAGE

BOOK NOW

Canada
Halifax to Atlantic Canada

DROP BY THE TOP OF THE WORLD.

Take yourself there

NOVA SCOTIA
NOVASCOTIA.COM

DANCE IN NIGHTCLUBS SURROUNDED BY STARS.

Take yourself there

NOVA SCOTIA
NOVASCOTIA.COM

Campaign Evolution - 2015




PACK LIGHT.
Breathe deep.

Let spontaneity guide your family along hundreds of hiking trails on one of the planet's most spectacular destinations – the world-famous Skyline Trail on Cape Breton Island. There's never been a better time to make unforgettable memories in an unforgettable place. All you have to do is take yourself there.

NOVA SCOTIA.COM
take yourself there

“North America's #1 Island.”
 2014 Travel & Leisure

Skyline Trail, Cape Breton Highlands National Park



MAKE IT A POINT
to explore.

Take a deep breath and capture the world's most photographed lighthouse for yourself. Nova Scotia's rich seafaring culture and historical significance come to life on a majestic coastal setting you'll never forget. All you have to do is take yourself there.


NOVA SCOTIA.COM
 CANADA

Peggy's Point Lighthouse, Peggy's Cove



YYZ TO FUN
Non-stop 2-hour flights.

NOVA SCOTIA.COM



YYZ TO WOW
Non-stop 2-hour flights.

NOVA SCOTIA.COM



LEAD WITH THE HEART
and the feet will follow

NOVA SCOTIA
take yourself there

See more
NIGHT LIFE
[CLICK HERE](#)

NOVA SCOTIA
Welcome to Atlantic Canada



Nova Scotia Tourism
16 mins · 📍

Take yourself back in time to a place where adventure and excitement go hand-in-hand. Now the only question is, who would you take with you?

Take Yourself There
Nova Scotia – an unforgettable place where the journey is as great as the destination.
NOVASOCTIA.COM

Like · Comment · Share

GET LOST in the right direction

The time is now. The place is beautiful Nova Scotia. Discover all there is to fall in love with along the shores of the great Atlantic.

NOVA STAR CRUISES
\$799.00

TAKE ME THERE

TOP 5 OUTDOOR ADVENTURES

"One of Canada's 5 most thrilling drives."

Cabot Trail - Cottage Life



Hiking

Step out of the house and into nature.

FIND TRAILS



Cycling

It's time to pack light and breathe deep.

GET ROUTES



Whale Watching

Don't blink. Nature wants to say hi.

SEE SPOTS



Kayaking

Come and get lost in the right direction.

SEE SPOTS



Zip Lining

Let spontaneity guide you.

LEARN HOW

"One of the world's 20 must-see places."

Cape Breton - National Geographic 2013

TOURISM NEWSLETTER

Stay in touch with everything adventure. Sign up for our newsletter!

SIGN UP

OUTDOOR PACKAGES

Tidal bore rafting

Feel the rush as the powerful tide washes away the everyday.

Starting at **\$94.00**

LEARN MORE

Cabot Shores

Imagine breathtaking views and incredible food. Now take yourself there.

Starting at **\$94.00**

LEARN MORE

Northumberland Shore

Discover everything Nova Scotia has to offer in one warm, friendly place.

Starting at **\$256.00**

LEARN MORE

TRAVEL GUIDE

Explore Nova Scotia and let our free travel guide lead the way. ORDER NOW

ACCOMMODATIONS



Seawind Landing

Located on 25 spectacular waterfront acres with 12.5 acres reserved to capture, and about half way between Halifax and the Cabot Trail, this is your destination for a perfect seaside cottage getaway.

Starting at **\$99.00**

LEARN MORE



Cape Split View Cottages

Two new coastfront cottages on a 6-acre parcel. The views are breathtaking with a 360-degree view from Cape Breton to Cape Sable in Cape St. Ignace.

Starting at **\$1050.00**

LEARN MORE



Jeremy's Bay Campground

Located in 25 hectares forest on the edge of North-Brace Lake, the first of its kind. The Village provides campers with 80 campsites and 1000m of shoreline. It's a combination of a family cottage with a beautiful nature getaway!

Starting at **\$26.00**

SEE THEM ALL



NOVA SCOTIA
CANADA

GET HERE FOR LESS

with Nova Star Cruises

Plan your trip today and experience Nova Scotia for yourself by sailing across the beautiful Atlantic Ocean aboard the Nova Star. Adventure awaits. Book your trip today.

LEARN MORE



ADD A DASH *of adventure*

SEE OUR TOP CULINARY ADVENTURES

www.novascotia.com/explore/outdoor-adventure

2015 novascotia.com

- Launch of new homepage:
 - Top 25
 - New air & sea access map
 - New Places to Stay search tool integration
- Launch of new explore landing pages:
 - Showcases top content
 - Plays video vignettes and lures to other videos



Canadian Tourism Commission (CTC) – US Pilot

- CTC has been absent from the US market
- In 2015, will re-enter with a pilot – 100% online

Pilot Objectives:

- Provide audience pools of pre-qualified high potential travelers to partners
- Partners further serve aligned content and ‘close the deal’ (book a trip or lead to a “closer”)
- Measure success and lift

CTC Partnership

CTC/Nova Scotia Co-Branded



Programmatic Display



Video & Programmatic Video



Social (native) and Paid Social



Awareness Mix:

- Display
- Video
- Social



Cobranded Landing Page (CTC/Nova Scotia)



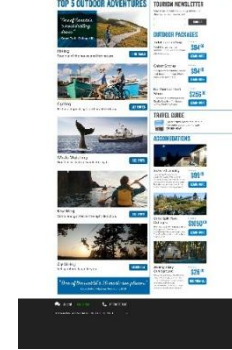
novascotia.com

Re-targeting List:

- Interacted with ads
- Visited landing page



Nova Scotia Branded



Conversion Ads



Nova Scotia's Landing Page



novascotia.com



2015 Joint Partnership

Partnership Pillars

Goals

Awareness through engagement

Executorial excellence

Drive visits to operator sites

Prove value of spend to operators

Be there when travelers are researching

Drive awareness of highest value traveller

CTC US Strategy

Use CTC investment to maximize working dollars

2015 Golf Strategy – Create a Sub campaign

Campaign Objective:

- Develop messaging that highlights Nova Scotia's top golf courses as travel motivators to attract first time visitors from our key markets.

Target market:

- Targeting the serious golfer who will visit Nova Scotia to experience a specific course, and not the traveler who enjoys golf on vacation. (Bucket list)

Positioning: Come to Nova Scotia. Play before the world does.

Media strategy: Leverage existing media channels and tactics within the *Take Yourself There* campaign.

2015 Golf campaign – Media Plan

Newspaper:

- Globe and Mail, Toronto Star, Montreal Gazette, La Presse and Boston Globe to support the golf message.

OOH:

- Leverage our digital board at Yonge & Eglinton

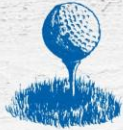


2015 Golf campaign – Media Plan

Digital Tactics:

- **Gmail:** A sponsored promotional email delivered to users who exhibit a strong interest in golf.
- **Facebook:** Sponsored posts in our schedule that would have the above targeting layered in for users on Facebook.
- **Content strategy:** Use Outbrain to promote golf:
“Did you know that one the top golf courses in the world is located right in Nova Scotia? Read more about it here.”
- **SEM:** Augment current ad groups by introducing broader targeting/ad groups by bidding on non-destination

Golf Creative – Print



PLAY CABOT CLIFFS

before the world does.

Rolling fairways with divots yet to be dug. Sand waiting to splash from deep and deceptive pot bunkers. And a two-club wind of sea salt air. This is Cabot Cliffs, opening July 2015. True links golf that demands your attention, against a backdrop that can't be ignored. It's the most anticipated new course of the year. Come discover Canada's next great golf destination.

NOVA SCOTIA .COM
take yourself there

"I never thought I'd see something
that makes Cypress Point look small."
-Matt Kuchar



What's Next?

- We need to work with key stakeholders to further develop plans
- Work with industry to maximize ns.com and elevate product and services

Questions?