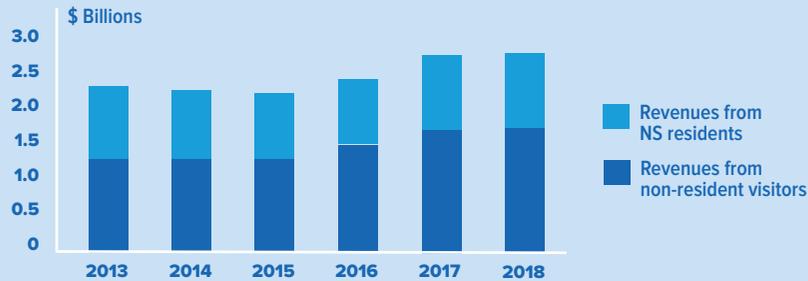


2018 TOURISM PERFORMANCE

Higher-spending visitors drive tourism revenues growth

TOURISM REVENUES



Tourism revenues reached \$2.61 billion in 2018, an increase of 0.3% compared to updated revenues estimates for 2017. Growth in revenues was driven by non-resident visitor spending.



\$4 BILLION GOAL

Nova Scotia's tourism industry is working to reach the Ivany Report goal of \$4 billion in tourism revenues by 2024

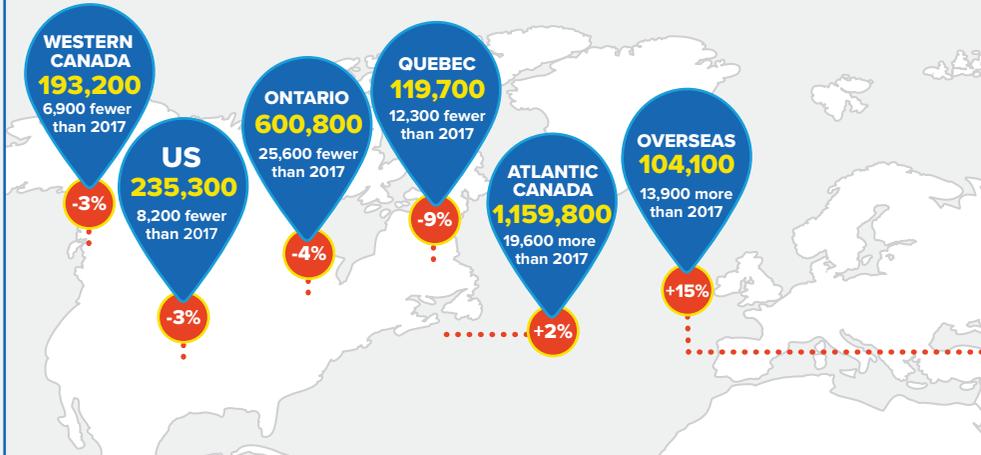
VISITORS



2018 brought **2.4 MILLION** non-resident overnight VISITORS to Nova Scotia

A slight decline of 19,500 visitors compared to a record number of visitors in 2017

WHERE OUR VISITORS ARE COMING FROM



LICENSED ACCOMMODATIONS IN NOVA SCOTIA

2.8 MILLION ROOM NIGHTS SOLD

19,600 more room nights compared to 2017

+1%



ROOM NIGHTS BOOKED THROUGH A SHARING ECONOMY PLATFORM

426,000 bookings in 2018

(Room nights booked through a sharing economy platform include both licensed and unlicensed accommodations)

+85% over 2017



TOURISM NOVA SCOTIA

HOW THEY GOT HERE

+4%



820,000 VISITORS ARRIVED BY AIR (30,300 more than 2017)

-3%



1,593,000 VISITORS ARRIVED BY ROAD (49,900 fewer than 2017)

STRATEGIC GAME CHANGERS

WHAT'S NEEDED TO REACH \$4 BILLION BY 2024

Nova Scotia has experienced strong tourism growth over the last several years. We've made great progress but there's more work to be done. Following are key opportunities that we must embrace to reach the \$4B goal.



ACCOMMODATIONS

MORE QUANTITY, QUALITY, & VARIETY

Nova Scotia needs over 5,000 more rooms and it's important that we offer the quality and type of accommodations travellers want.

YEAR-ROUND OPERATIONS NOVA SCOTIA SHOULD ALWAYS BE IN SEASON

We need to develop, expand and improve our off-season offerings.



LABOUR

A SKILLED TOURISM WORKFORCE

We must do everything we can to attract and retain more qualified workers.



CHINA

WE CAN BECOME CANADA'S NEXT "HOTSPOT" FOR CHINESE VISITORS

We must offer and promote experiences that will inspire Chinese travellers to choose Nova Scotia.

AIR CAPACITY

VISITORS ARRIVING BY AIR SPEND MORE

We need to increase access through more direct flights from priority markets.



INCREASED MARKETING

SMART PARTNERSHIPS DRIVE VISITATION

We must continue to build awareness of Nova Scotia as a vacation destination.

