

Adapt to Win!



Good afternoon!

I'm here to rally you, the tourism troops.

Over these two days, you're going to hear a lot about the state of the nation when it comes to tourism. You've likely heard a lot about the \$4B goal—and questioned if we're going to make it. As you should - \$4 billion in annual tourism revenues by 2024 is an ambitious goal. But it takes ambitious, audacious goals to serve as catalysts and inspire change.

Change is all around us – especially in tourism. Tourism in Nova Scotia looks very different than it did just five years ago. In 2018, we welcomed about half a million more visitors than in 2013. Last year, tourism spending in Nova Scotia generated \$2.61 billion in revenues- the highest EVER. That's a lot of new faces and a lot of new expectations.

Change can be scary. It can be daunting—intimidating—overwhelming. It can be hard to see yourself in sweeping change, to see how you fit in. But change brings opportunity. And today, I'm going to talk about the huge opportunity in front of us.

Both the provincial and federal governments are recognizing tourism as a key pillar in our economy. Tourism is big business. We just heard Minister MacLellan speak about the importance of tourism to the province's economic growth strategy. And the

Government of Canada this year launched a federal tourism strategy which identifies tourism as one of seven priority sectors in our country. Folks, this is a big deal.



Over the past several years we've seen new investments in the local tourism industry – people building new hotels, glamping sites, opening tour companies, breweries, and restaurants. And the province is investing \$6 million in tourism infrastructure to enhance the visitor experience at our most iconic sites and destinations.

We've got momentum. Our industry is strong, and its potential is massive. Now is the time for us to pull together and charge *forward*.

Forward FOR Nova Scotia!

Let's start with where we are today.

Your customers are more interested in booking online than calling you directly. Heck, many would rather send you a text message than actually pick up the phone. Maybe you're trying to coordinate bookings through multiple platforms like Booking.com, Expedia and your own website. You might have customers posting complaints online, and how do you deal with that without sinking your Google results?

People have different expectations now about service and quality. You have to pay attention to your bottom line, but you also want to invest in your business so your property is fresh and inviting, or your equipment is up-to-date.

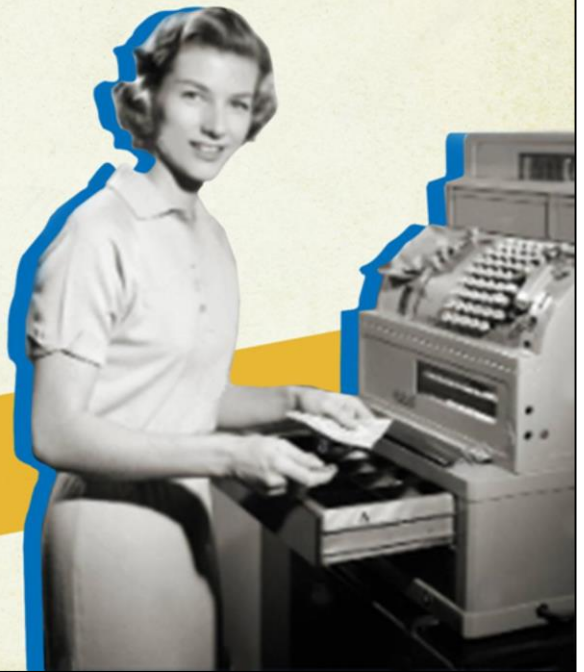
Marketing your business seems like it could be a full-time job, and that's not even including all the social media channels! It's the customer's world, and you're in the middle of it.

That's the reality of our situation. It really is the customer's world, and if we want to continue to grow tourism in Nova Scotia, we have to continue to evolve the way we do business to meet the new realities of our industry.

Those who adapt, will have much to celebrate—and they will thrive.

WE NEED TO CLOSE THE GAP.

\$1.2B to go!



According to my team's projections, if we -- as a collective- - continue to work and invest in tourism growth the same way we are today, we will fall short of the \$4billion dollar goal by \$1.2 billion.

But think of how far we've come, and how businesses, communities and Nova Scotians are benefiting from the progress being made. Now is not the time to retreat. It's time to close the gap. Let's not leave \$1.2 billion on the table.

We at Tourism Nova Scotia are up for the challenge, and we're here to provide leadership, advice and guidance to those who are committed to being part of Nova Scotia's tourism transformation.

And we've had to transform ourselves. As an organization, we've undergone significant change. At times, it's been uncomfortable for us, and I'm sure uncomfortable for you. That's just human nature.

But we're not making changes blindly. Everything we do is based on research. That means that when we make decisions or put support behind a project, we are acting on what research tells us our target travellers are looking for.



This has been a big year for Tourism Nova Scotia and our partners. Our vision is to be recognized globally as the leading destination marketing organization. And guess what? The world is taking notice. Just last week, our World-Class Experience EXCELLerator program won the Innovation award at the Canadian Tourism Awards. We are getting recognition –and that’s because of the work that we’re all doing together.



But recognition while awesome, isn't enough. We need to generate concrete results. At Tourism Nova Scotia we evaluate our programs and activities to make sure that what we are doing is having the desired impact. Last year, we commissioned a study to understand the return on investment for our 2018 marketing campaign. The results showed that every dollar invested in our media buy in key markets generated **\$26** in spending by visitors from those markets. That's a strong result for our 2018 campaign.

Tourism revenue growth will continue if we take the necessary risks and actions to move the needle forward. Each of us has a different role to play. We must acknowledge our specific roles, goals, limitations, and aspirations. Avoiding duplication and spending our time and money strategically is half the battle. The other half?...working together.

For Tourism Nova Scotia, we are the tourism marketing organization for Nova Scotia. We're tackling the key markets of Quebec, Ontario, the Northeastern US, the United Kingdom, Germany and China. We can't be everywhere at once. We've chosen these markets for a reason. We've done our research and know we have what it takes to compete effectively in these markets. It's these visitors who will spend more and stay longer when they visit.

KNOW YOUR ALLIES



Tourism
Operators



Tourism
Nova Scotia



Government
Departments & Crowns



Ports



Airports



Industry
Associations



Regional Marketing
Organizations

But we're just one brigade in this force. We've got the **Halifax International Airport Authority** establishing new air routes that align with our priority markets. The easier it is to get here, the more likely travellers will come!

The **Port of Halifax, Port of Sydney** and other small ports doing their part on the seas to bring in cruise ship passengers. Where can they spend their money when they get off the boat?

Events East and Communities, Culture and Heritage are recruiting special events, meetings, and conventions. Events like the 2020 Indigenous Games will bring thousands of people to Nova Scotia, and they will need to eat, sleep and get around the province.

Develop Nova Scotia leads the development of high potential and priority infrastructure in communities through the province. They're in the business of developing "places" that will attract people to visit, live, work and invest.

Government's role is to consider how best to align policies and infrastructure investments with tourism growth priorities.

Communities are working to create attractive destinations and consider visitor needs in developing appropriate amenities like signage, washrooms, and parking. Washrooms are like oxygen to visitors – they don't notice them unless there aren't any! Then we get

the phone calls.

Marketing organizations like DCBA and YASTA and Discover Halifax (to name a few) are doing a great job of highlighting their regions' collective offerings and putting their communities on the map.

And **tourism operators and businesses** are striving to offer the types of experiences and products visitors want, and to make cash registers ring.

We must continue to focus on the opportunities we have before us, with everyone owning their roles.

Tourism growth is a long game. Where we are today should be celebrated—in all seriousness, we've come a very long way in a short period of time, but now we're at a crucial point.

IT'LL TAKE MORE TO REACH OUR GOAL.

It'll take changing the game.

There are several areas of opportunity, that would dramatically increase our ability to reach \$4 billion. My team and I call them the game-changers.

We need more direct **air connections** with our target markets.

We have to create unique, purchasable experiences that inspire people to book a trip here right now. We have to create events and experiences that will draw visitors in off-peak months so we can **extend the tourism season**.

We need to provide visitors with a variety of **high-quality accommodations**.

We must invest in digital marketing and **marketing partnerships** to raise awareness of Nova Scotia. We must respond to the changes in consumer behavior and make sure we promote Nova Scotia products where visitors are looking and give them online booking options.

Chinese travellers are already in love with Canada – we just need to get them to our part of the country.

We have to attract and retain **employees** and help them see their future in tourism.



So those are the big game-changers. But there are things you can do right now in your own businesses and communities that can help Nova Scotia stand out as a world-class destination.

Think like a traveller, and make it easier for customers to find you, book with you, and champion you! I'm going to outline some changes that you can make – and make tomorrow. These aren't sweeping policy changes. These are small steps you can take that will have big impacts. Success for our province starts on the home front—and it starts with you. Here are some tactics you can think about...

DIG DEEP for Victory



GROW YOUR BUSINESS ONLINE

Most travellers are planning their trips online. You need a good website. For 99.9% of businesses and organizations, that's a non-negotiable.

A professional looking website that provides up-to-date information about what you're offering, including photos, builds trust with potential customers.

Our research shows that travellers are more likely to be influenced by peer reviews than by standard quality programs or government inspections. Peer reviews are the number one source of inspiration for travellers.

What does that mean? It means if you don't own your TripAdvisor listing or your Google Business listing, you're letting someone else decide what people should know about your business. The online conversation is happening, with or without you. Claim your listing. Update your page. Make sure the information that's out there about you is correct.

Add photos that show the best of what you have to offer. And when someone comments about you - respond. Thank them for their lovely review and let them know you appreciate their business.

But don't just respond to the good reviews. A bad review is a chance to show your customers you care about their experience with a considerate reply. If a customer complained to you in person, you'd act on it, right? So do the same thing online. Let

them know what you're doing to address their concern, or what improvements you've made since their visit. Not only will you help them feel better about the experience, you'll let future customers know that they won't have the same issue. In fact, 85% of TripAdvisor users say a constructive response to a bad review actually makes them think more highly of a business.

CAN ALLIES SPOT YOU?

Not if you're not online.

MIGHT AS WELL BE IN CAMOUFLAGE, SOLDIER.

A good website also makes it possible for people to find you in a search. Our friends from Google Canada will be here with a Google Help Desk tomorrow; they can talk to you about how to optimize your website for site speed and search results.

I need to say it - Airbnb is not your enemy. That genie is not going back in the bottle. We have seen explosive growth in room night bookings through sharing economy platforms – a 77% increase in 2018 according to AirDNA. That tells us visitors are on there booking their stay in Nova Scotia.

Nothing is stopping you from using those platforms to your advantage. Go where the travellers are already looking. Market your business on the top booking platforms – Airbnb, Expedia, Booking.com, etc. If you aren't there, you're missing the chance to be seen by millions of travellers all over the world.



Once they find you, they need to be able to book with you.

If you're not already using a booking engine it's an important business tool. There are tons of options, it doesn't have to be complicated.

When we surveyed visitors from our key markets in 2018, we asked them how they booked their trip. 71% of visitors from Quebec made an online booking in 2018. 76% from Ontario. 82% from the Northeastern US, and 96% of overseas visitors made an online booking. If you don't offer an online booking option, you are going to miss out on a lot of customers.

Just imagine: a visitor in Germany has done their research, they found your webpage or your listing on NovaScotia.com, looked at the fantastic pictures of your business, and they are stoked to come spend a few nights with you. Now they want to make a booking. But the only options you provided are to call or send an e-mail to check availability and reserve. You are going to ask them to make an international call from a different time zone to try to catch you during your business hours? You've lost that sale. Give them a secure and easy way to book with you online.



We often have visitors fill out comment cards at our visitor centres or send us e-mails to say how much they enjoyed Nova Scotia. And without fail, the thing they mention is how friendly the people were and how great the hospitality was. Those people go on to sing our praises to their friends and family!

Help create memorable moments for our visitors. Give them a world-class experience that exceeds their expectations. That means investing in creating travel experiences that excite visitors and give them an emotional connection to Nova Scotia. It also means delivering a level of quality and service that leaves a lasting impression.

Make it easy for people to spread the word about you online. Give them a photo opportunity, something they can share on Instagram.



Think about Lockett's Vineyard and the red phone booth. If you do a search for Lockett's, you're going to find hundreds of photos with happy people in front of that phonebooth.



Or look at the Halifax waterfront. Our friends at Develop Nova Scotia are doing a great job of giving people places to take attractive photos, which they then share on social media and talk about how great their time was in Halifax.

I'm thinking about the hammocks and the Maud Lewis photo frames that were on the boardwalk this summer, for example.

When you give people something they can share on social media, it's valuable word-of-mouth advertising.



TEAMWORK BUILDS SHIPS

FRIENDSHIPS. HAHahaha! OH, MAN. ANYWAY, AS YOU WERE.

The individual actions you take to adapt your businesses, museums, parks, communities and deliver on visitor expectations will have big impact for Nova Scotia's tourism industry. But you are not in this alone.

Don't think of the bed and breakfast down the road as taking customers from your inn. The walking tour isn't competing with your boat tour. The South Shore isn't drawing visitors away from the Annapolis Valley. Your neighbours are not your competitors – they are your partners.

There is strength in numbers. A compelling destination needs a cluster of tourism experiences that offer a variety of options for visitors. The more you offer, the more likely it is that visitors will stay longer and spend more. And that is our goal.

Think about the other businesses near you – what do they offer that you could package with your services to create a special experience?



Lunenburg Walking Tours teamed up with Lunenburg Heritage Fishing Tours, Ironworks Distillery and the Fisheries Museum of the Atlantic to provide a one-of-a-kind experience. Visitors hear rum running stories on a boat tour of the historic Lunenburg waterfront, complete with a stop at the world's only floating rum warehouse, meet the distillers behind the rum at Ironworks Distillery to discover how they partner with local farmers in crafting their spirits, and enjoy an exclusive sunset seafood dinner aboard Canada's oldest Saltbank schooner.



How can you work with other businesses or organizations to attract visitors to your community?

Lee Fraser and the team at Live Life in Tents has been teaming up with Destination Cape Breton Association, Parks Canada and other businesses on Cape Breton Island to host Creatives Weekends. Creatives Weekends are a social networking event that provides food, accommodations and entertainment for bloggers, photographers and videographers in exchange for content the sponsors can use to promote their business. They invite social media influencers who have an interest in hiking and create the kind of content that appeals to the visitors they want to attract.



How can businesses, governments and residents work together to make your community stand out to visitors?

In Port Hood, the community developed a master plan and community brand. The businesses partnered with government to make investments to heighten the attractiveness of their establishments for customers.

They created beautiful signage so visitors could easily find their way to the five incredible beaches in town. And they gave visitors a place to stop and take it all in (and get their photos) at the sunset vistas.



Another great success story that came out of collaboration is the Rum Runners Trail. Our experience development team and marketing team have been working with Bicycle Nova Scotia to develop marketing materials and promote cycling along the trail for several years. A member of our sales team pitched the Rum Runners Trail to Great Canadian Tours, and now we've worked with them to develop an itinerary and shoot a great video to promote a cycling tour.



We can make amazing things happen when we work together.

Remember Tourism Nova Scotia is here to help.

We have the top **research team** in the country. In fact, our director of research and policy is leading Destination Canada's research committee right now. You have access to statistics about where visitors are coming from, where they stay, what they like to do when they are here, and how much money they spend. We can help you put this information into action to guide your business growth.

Our **business development** team and experience development team offer workshops, toolkits and coaching to help you identify business opportunities, connect with resources, and get moving on your business plans.

Our **market development** team can offer you advice on how to work with national and international tour operators and travel agents to attract more visitors from our key markets.

Our **consumer marketing** team can help you build your best business listing on NovaScotia.com to get more clicks through to your website. There are opportunities to leverage our social media following to promote your business with the #VisitNovaScotia hashtag.

Through our **Digital Content Marketing Program**, we can co-invest with you to create engaging content and digital marketing campaigns to reach more customers in key markets.

Our nationally-recognized **World-class Experience EXCELLerator Program** can help you create purchasable experiences that our research shows will appeal to our target travellers and build media buzz about your business.

TNS is hosting a panel tomorrow where our management team will do a deep dive into the resources available to you that can help you increase your profile, attract your best customers and maximize sales.



I want to end with one final call to action. Be proud of your province!

I've travelled all over the world and worked in the travel industry nationally and internationally. Nova Scotia is a world-class destination. We're gaining a reputation as culinary destination and wine region. We're home to the world's highest tides and some of the nation's most significant historic sites. Cape Breton Island is considered one of the best island destinations in the world and has some of the top golf courses. We have entrepreneurs with fresh ideas about how to connect visitors with our natural assets and provide one-a-kind experiences. We have rich culture and musical talent that is second to none.

There is so much opportunity to grow the tourism industry here and compete with the biggest destinations in the world.

TIANS is the voice of tourism in the province. As members, you need to share your accomplishments and help Nova Scotians understand the value of tourism for our provincial economy. Be a champion for Nova Scotia's tourism industry—and get your neighbours, and the folks at the gas stations and coffee shops to be one too!

I hope you will leave here today and feel inspired to implement your own changes and keep the momentum going. I invite you to join our session tomorrow to get started on your action plan. Together – Forward for Nova Scotia.

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