

TOURISM
NOVA SCOTIA 



2021-22 BUSINESS PLAN

TOURISM NOVA SCOTIA

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BOARD CHAIR/CEO MESSAGE

2020 was truly an unprecedented year for the tourism industry. There is no playbook for the circumstances that we have faced over the last year. But as we look to 2021 and beyond, there is cause for optimism. Nova Scotia's effective public health measures have made international headlines, the COVID-19 vaccine roll-out is underway around the world, and Nova Scotia's strengths as a destination – spacious natural beauty, variety of activities, friendly communities, and welcoming culture – are valued more now than ever before.

As Nova Scotia's tourism marketing and sector development organization, Tourism Nova Scotia's priorities for 2021-22 are supporting a tourism revenue goal of \$1.2 billion, helping to mitigate the impacts of COVID-19, and rebuilding and reimagining the province's tourism industry. These priorities will be achieved through our programs, partnerships, and marketing activities.

Recovery can only be achieved through partnership and collaboration. We will continue to work in tandem with our sister Crown organizations, the Tourism Stabilization Working Group, sector associations, industry organizations, and businesses across the province to emerge from the pandemic stronger than before.

From partnering with Digital Nova Scotia on the Tourism Digital Assistance Program to working directly with business and regional destination marketing organizations to create off-season travel packages, our work will help tourism operators adapt to new operating realities with an emphasis on quality, accessibility, digital adoption, and evolving to become a four-season tourism destination.

Our efforts to rebuild the tourism industry will include targeted marketing activities that capitalize on new opportunities, specifically, Canadian remote workers interested in moving here permanently, as well as those who will include Nova Scotia as a long-stay destination as part of their nomadic work life. Attracting remote workers will not only increase demand among businesses in the tourism sector but will also support the province's population growth goal. We will also work with industry to develop new self-isolation packages that enhance the quarantine experience of newcomers and long-stay visitors on arrival.

In alignment with public health protocols, our marketing efforts will target travellers who are most able and willing to visit our province when the time is right. Research will help inform when, where, and what we say to these travellers to invite them to explore Nova Scotia.

Our immediate marketing focus will be on encouraging Nova Scotians to safely explore the province and support local businesses. As conditions improve, we will expand campaigns to regional close-drive markets such as New Brunswick and Prince Edward Island to safely generate as much tourism activity as possible. We will also use our marketing expertise to support the return and recovery of events and conventions in close collaboration with Events East Group, Events Nova Scotia, and Discover Halifax.

It will be crucial to remind Nova Scotians that the tourism industry is important to our economy, communities, and quality of life. We will encourage Nova Scotians to celebrate who we are as a destination and become ambassadors for Nova Scotia's world-famous hospitality.

Mitigating COVID-19 and rebuilding the tourism industry will not happen overnight. Indeed, there will be challenges and uncertainty to overcome in the months and years ahead. However, we

also have a tremendous new opportunity to guide and create a stronger future for tourism – one that benefits all Nova Scotians.

Sincerely,

R. Irene d'Entremont, C.M., O.N.S., D.Comm hc, HL-Col, Chair, Tourism Nova Scotia Board of Directors

Michele Saran, CEO, Tourism Nova Scotia

STRATEGIC APPROACH/CONTEXT

In 2014, the *Nova Scotia Commission on Building Our New Economy* issued a call to action for Nova Scotians to change their attitudes and behaviours and chart a new economic future for our province. Tourism was identified as one of several key sectors with the potential for growth. The commission challenged the industry to double annual tourism revenues from \$2 billion in 2010, to \$4 billion by 2024.

In 2020-21, the COVID-19 pandemic rendered the \$4 billion goal an impossible target. Tourism Nova Scotia adjusted quickly away from its “Driving Export Revenue” strategy to help mitigate the operational impacts that tourism businesses were facing due to border closures and public health restrictions. Activities in 2020-21 included direct financial support to tourism businesses and organizations that were affected by public health orders, as well as marketing and communications activities to encourage Nova Scotians and fellow Maritimers to travel within Nova Scotia. Tourism Nova Scotia conducted business training and coaching to help businesses adapt and improve their digital knowledge, and helped tourism businesses build and sell packaged experiences and products that appealed to those who were most able and willing to travel to and within Nova Scotia.

COVID-19 vaccinations started in December 2020, and will continue through 2021, with the expectation that by fall 2021, most Nova Scotians will have access to the vaccine and domestic travel and health restrictions will be lifted.

The 2021-22 business plan aligns with government’s inclusive economic growth priority and reflects the continuation of Tourism Nova Scotia’s efforts to mitigate the impacts of the pandemic and related public health orders, help industry operators adapt to current and evolving operating conditions, and support sustainable industry recovery.

The tourism industry suffered tremendous financial impact in 2020, and 2021 must be a better year in order for the tourism industry to survive and recover. To that end, Tourism Nova Scotia will focus its programming, partnerships and marketing initiatives to support an industry goal of \$1.2 billion in tourism revenues in 2021, an increase of one-third compared with 2020’s best case scenario of \$900 million.

Flexibility and responsiveness are key; Tourism Nova Scotia’s activities will be informed through ongoing consultation with the Tourism Stabilization and Recovery Working Group, comprised of representatives from the Department of Inclusive Economic Growth, Tourism Nova Scotia, and the Tourism Industry Association of Nova Scotia (TIANS). Other tourism stakeholders, including regional destination marketing organizations (DMOs), sector organizations such as the Restaurant Association of Nova Scotia (RANS) and Hotel Association of Nova Scotia (HANS), and individual tourism operators will also inform Tourism Nova Scotia’s activities.

Ongoing consultation, in concert with close monitoring of operating conditions and public health directives, will ensure activities and initiatives reflect the best available opportunities to drive tourism revenue growth in 2021-22.

PURPOSE OF CROWN CORPORATION

Tourism Nova Scotia was established as a private sector-led Crown corporation to achieve tourism growth in the province. As the destination marketing organization for Nova Scotia, Tourism Nova Scotia is responsible for developing a tourism strategy and leading tourism marketing and sector development efforts.

Mission

To market Nova Scotia's tourism experience to the world through innovation and collaboration.

Mandate

The Tourism Nova Scotia Act, passed on May 4, 2015, states the objects of the corporation are to:

- achieve tourism growth in the province and maximize the value of tourism to the economy of the province
- develop and implement a long-term strategy for tourism to drive sustainable tourism in the province that delivers growth and profitability in the tourism industry, provides economic benefit to the province, and is consistent with the province's strategic priorities
- communicate and collaborate with communities, private industry, and the tourism industry in the province

Vision

To be recognized globally as the leading destination marketing organization.

GOVERNANCE

Tourism Nova Scotia is led by a private sector board of directors consisting of industry and business leaders from across Nova Scotia. Directors are elected to the board based on a nomination process. Tourism Nova Scotia's Chief Executive Officer reports to the Chair of the board of directors. The Chair reports to the Minister of Inclusive and Economic Growth.

OPERATING ENVIRONMENT/CONTEXT

The impact of the COVID-19 pandemic has been felt globally, nationally and provincially, with a collapse in tourism demand and resulting negative impact on tourism businesses around the world. The United Nations World Tourism Organization estimates a 74 per cent decline in international tourism demand in 2020.

Nationally, Destination Canada is projecting a 62 per cent decline in overall Canadian tourism demand (international and domestic) in 2020. For 2021, depending on when international borders might open, Destination Canada is projecting an increase in overall tourism demand of between four per cent (if international borders open in October 2021) and 20 per cent (if international borders open in April 2021), compared with 2020 results.

In Nova Scotia, the COVID-19 pandemic significantly affected the tourism operating environment in 2020, and these effects will continue well into 2021, which will be another challenging year for tourism businesses.

Tourism Demand

The COVID-19 pandemic, public health orders and travel restrictions resulted in a significant decline in travel to and within Canada. In addition to affecting desire and ability to travel, the pandemic has influenced consumer preferences. Research suggests that less-crowded, rural destinations will be more appealing than busy urban destinations, and that travellers will avoid crowded spaces for some time. Outdoor activities have increased in popularity.

Travel restrictions were further compounded by gathering restrictions, and according to estimates compiled by Destination Canada, fully 84% of business events in Canada were cancelled in 2020.

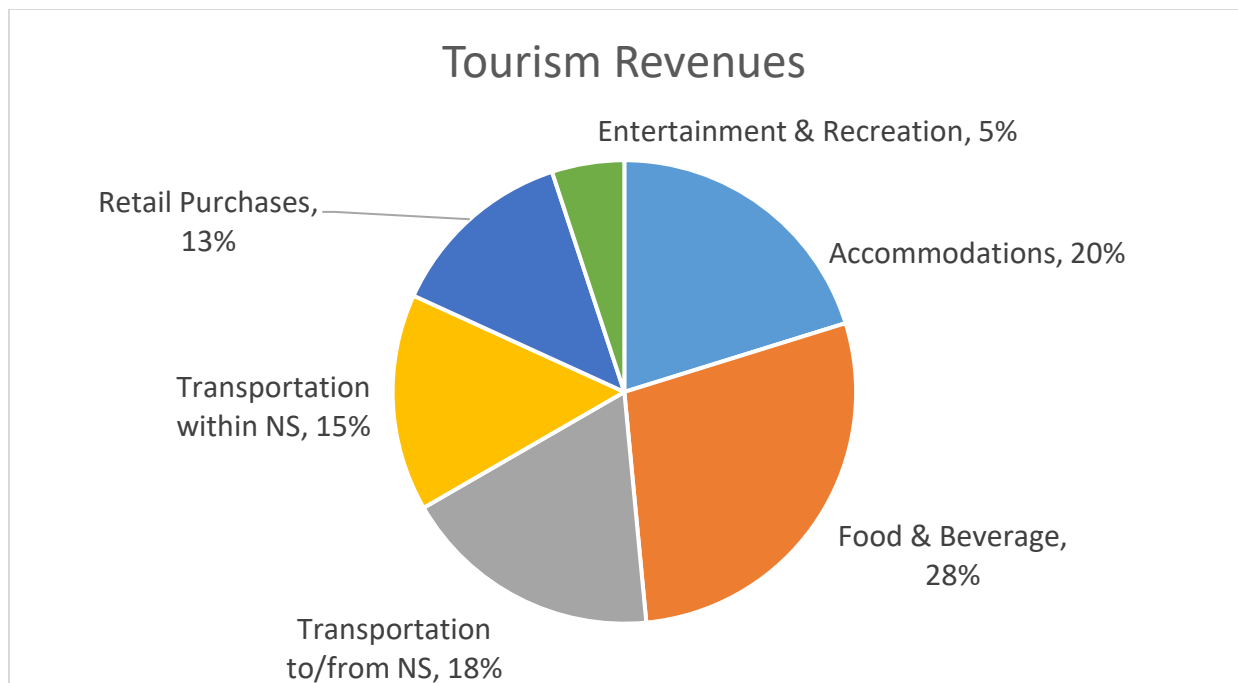
Fear of travel coupled with the various public health policies made a traditionally welcoming population much less likely to accept visitors from outside their communities or provinces. This sentiment is closely related to Canadians' perceptions of their personal health and safety, and factors such as:

- control of the pandemic in Canada as well as internationally
- availability of a vaccine
- health and safety public policy measures, such as social distancing and mask requirements
- travel industry operators' health and safety protocols

At the same time, research indicates there is pent up demand, with travellers waiting for conditions to improve and restrictions to ease. The most recent data from Destination Canada indicates that 40 per cent of Canadians are very likely to take a trip outside of their province within Canada in 2021.

Tourism Revenues

Tourism revenues are calculated based on spending by residents and non-residents across many sectors as outlined below. At the beginning of 2020, Nova Scotia's annual tourism revenues stood at \$2.64 billion, an increase of \$600 million compared with the baseline year of 2010. It is estimated that the best case for tourism revenues for 2020 is \$900 million (to be confirmed), a \$1.7 billion decline from the previous year. 2021-22 will be another challenging year, as opportunities to attract tourism revenues from markets outside of Nova Scotia will be limited.



Accommodations

Nova Scotia's accommodations sector was particularly hard hit by the pandemic. Across the province, room nights sold declined by 54 per cent in 2020. The Halifax region has been disproportionately affected, and the data indicates that while other regions saw some

improvement in the later months of 2020, albeit well below 2019 levels, the Halifax region did not experience this trend and saw continued significant declines.

Region	2020 Room Nights Sold	2020 versus 2019	July-Dec 2020 versus 2019
Nova Scotia	1,253,000	-54%	-55%
Halifax Region	631,000	-59%	-65%
South Shore	103,000	-41%	-34%
Eastern Shore	11,000	-38%	-32%
Cape Breton	199,000	-54%	-52%
Northumberland Shore	99,000	-47%	-45%
Bay of Fundy & Annapolis Valley	170,000	-48%	-46%
Yarmouth & Acadian Shores*	41,000	-29%	-14%

*This region experienced a 20 per cent decline in room nights sold in 2019 as a result of the Maine-Nova Scotia ferry not operating.

Food & Beverage

Nova Scotia's food services and drinking places saw a decline in demand as a result of public health orders, compounded by the significant decline in non-resident visitation to Nova Scotia in 2020. These declines were partially offset by early pivots made by these businesses to offer takeout and delivery service. Marketing and experience/package development that encouraged Nova Scotians and Atlantic Canadians to support provincial tourism and hospitality businesses also helped offset declines.

In 2020, Nova Scotia food services and drinking places receipts decreased by 24 per cent to \$1.35 billion. Canada's food services and drinking places receipts decreased by 28 per cent to \$55.5 billion. With a 24 per cent decline, Nova Scotia performed better than some provinces (Quebec and Ontario each experienced a decline of 31%), and worse than others (the other three Atlantic Provinces each experienced a decline of only 19%). Source: Nova Scotia Finance and Treasury Board

Transportation

In recent years, approximately one-third of non-resident visitors to Nova Scotia arrived by air. Air capacity collapsed globally in 2020, with airlines cancelling or reducing routes and laying off staff.

Market	% Visitors Arriving by Air (2019)
Atlantic Canada	8%
Quebec	29%
Ontario	50%
Western Canada	79%
Northeastern US	31%
Other US	65%
Overseas	100%

How and when air capacity will be restored is unknown, and further away markets that have traditionally been important sources of visitation and tourism revenues for Nova Scotia businesses may take several years to fully recover. Projections developed by Destination

Canada suggest the earliest that international travel to Canada will fully recover is 2024. This means that for the next few years, tourism travel to Nova Scotia will come primarily from domestic markets.

The reduction in tourism activity in Nova Scotia in 2020 also resulted in less spending on transportation services in Nova Scotia, such as car rentals, gasoline purchases, vehicle maintenance, and paid transportation within the province.

Finally, cruise ship restrictions will continue into 2022, which will have a sustained negative impact on those businesses that rely on these vessels and their passengers.

Remote Workers

Prior to COVID-19, technology adoption and the availability of high-speed internet service facilitated the ability to connect to one's workplace remotely and informed a new type of employee. Remote working had emerged as an employment model, with employers using the ability to work remotely as a benefit to attract skilled employees. COVID-19 health restrictions accelerated adoption of remote working, forcing more employers to shift to this type of operating model. At the end of 2020, many more employees, particularly those in knowledge sectors, can or are working remotely. With a strong tourism reputation and coastal location, widespread availability of high-speed internet access, and public health regulations that have limited the number of COVID-19 cases, Nova Scotia is uniquely positioned to attract remote workers to live, work and play here. New residents, whether temporary or permanent, will add to Nova Scotia's dynamism and can help restore consumer demand in tourism, arts and culture sectors.

Geographic Markets

Prior to 2020, Tourism Nova Scotia directed its marketing activities at specific geographic markets outside the Atlantic region, reflective of its export-focused strategy. In 2020, Tourism Nova Scotia pivoted to adjust to COVID-19 operating conditions, with a focus on encouraging local travel within the province, and travel to Nova Scotia from markets within the Atlantic Bubble, specifically, New Brunswick and Prince Edward Island.

Nova Scotia

Travel and related tourism spending by Nova Scotians were critically important in 2020. Despite Nova Scotians spending less per person than visitors from other markets, travel by Nova Scotia residents will remain the most important source of tourism revenues in 2021.

Atlantic Canada

Atlantic Canada has long been an important source of visitors for Nova Scotia, accounting for approximately one-half of non-resident visitors. In 2020, reflective of travel restrictions and reduced travel demand, Atlantic Canadians were the most important non-resident visitor segment for Nova Scotia.

Although Atlantic Canadians make up a large percentage of non-resident visitors, their spending tends to be more modest compared with visitors from further away markets.

Further Away Canadian Provinces

Canadian visitors from outside of Atlantic Canada have historically been important contributors to Nova Scotia's tourism economy, accounting for one-half of the province's non-resident tourism revenues. Compared with Nova Scotians and Atlantic Canadians, visitors from these further away provinces stay longer, spend more, and visit more regions of Nova Scotia.

In 2021, there is an opportunity to attract long-stay visitors to Nova Scotia from other Canadian provinces. As provincial vaccination programs roll out, there may be a broader opportunity to attract fall and winter 2021 visitation to Nova Scotia. By Q4 2021-22, there may also be opportunities to engage Canadians to make Nova Scotia part of their 2022 travel plans.

The United States/Overseas Markets

Visitors from international markets typically represent 14 per cent of non-resident visitation to Nova Scotia but contribute one-quarter of non-resident tourism revenues. These visitors stay longer, spend more, and visit more regions of the province. Visitors to Nova Scotia from these markets are much more likely than those from Canada to purchase their travel through the travel trade.

It is unlikely that travel conditions will improve in time to attract visitors from these markets to Nova Scotia in 2021. Given the longer planning cycle required for working with the travel trade, 2021 will be an important year to maintain relationships with the travel trade and keep Nova Scotia top-of-mind with travellers, in order to influence travel to Nova Scotia in 2022.

Technology Adoption

A 2019 report from the Atlantic Provinces Economic Council showed that Atlantic Canadian firms trail in terms of adoption of digital technologies. COVID-19 has accelerated adoption of technology and increased the gap between current technological capabilities of many Nova Scotia tourism businesses and customer expectations. With large proportions of entire communities being encouraged or told to stay home for several months, consumers became much more comfortable going online to search for and purchase goods and services. From a travel perspective, consumers are now much more proficient looking for and booking travel-related products online. Going forward, they will expect tourism businesses to have the type of online content and services (e.g., online booking) they seek. Tourism businesses must adapt to survive.

Seasonality

The pandemic highlighted an issue that had previously been identified as a challenge for the provincial tourism industry: seasonality. Historically, July and August have been Nova Scotia's strongest months in terms of visitation and tourism revenues. The impact of the pandemic resulted in dramatically reduced demand during the most important months of the year. Many tourism businesses operate on a seasonal basis and most year-round businesses rely on the traditional peak season for the bulk of their revenues. Year-round tourism spending is essential for Nova Scotia's tourism industry to be in a better position to take on another pandemic or global event. It is also critical to business resilience and tourism sustainability. Tourism businesses in more rural areas that stay open longer will help improve the appeal of communities for permanent residents and enhance the quality of life for Nova Scotians.

PRIORITIES/ACTIVITIES/INITIATIVES/ROLE AND FOCUS FOR 2021-22

In 2020, Tourism Nova Scotia quickly pivoted to adjust to the new realities and operating conditions created by the pandemic. The 2021-22 business plan is a continuation of Tourism Nova Scotia's focus on opportunities to help ensure the sustainability of tourism industry businesses across the province. Tourism Nova Scotia's programs, partnership and marketing activities will support a tourism industry goal of \$1.2 billion in provincial tourism revenues, a one-third increase over 2020's best case scenario of \$900 million. This is an aggressive goal, based

on the Atlantic Bubble re-opening in 2021, and public health self-isolation requirements being eased for visitors from other Canadian markets by fall 2021. It will require a concentrated focus across the tourism industry on activities that will increase the capacity of Nova Scotia tourism businesses to attract customers across all four seasons.

Tourism Nova Scotia's priorities in 2021-22 align with the overlapping phases of Mitigation, Adaptation and Recovery.

Mitigation

Mitigation efforts will focus on programs and supports that are responsive to the immediate short-term needs of tourism and hospitality businesses and help increase demand across the province. Tourism Nova Scotia will continue to work with the Tourism Stabilization and Recovery Working Group, tourism operators, sector organizations and regional destination marketing organizations (DMOs) to mitigate the impacts of COVID-19 and related public health measures.

Industry Support

Tourism Nova Scotia will help identify and provide administration support for programs and services aimed at tourism operators with a focus on assisting those most severely affected by public health orders. In 2020-21, Tourism Nova Scotia partially funded and provided administration support for the Tourism Accommodation Real Property Tax Rebate Program (TARPTR); administration support will continue in 2021-22. Tourism Nova Scotia will also provide administration support for the Small Business Real Property Tax Rebate Program.

Regional DMOs saw a marked decline in revenues in 2020 and received financial assistance through the \$2 million Regional Destination Marketing Organization Partnership Program, supported by funding from Destination Canada. This program provided funding to DMOs to support operations until September 2021. In 2021-22, Tourism Nova Scotia will work to ensure regional DMOs have enough operating funds to continue operations at or above pre-pandemic levels. Tourism Nova Scotia's RADIATE and Digital Content Marketing partnership programs will support DMOs with their marketing efforts.

Generating Local and Regional Tourism Demand

Increasing demand for local businesses is critically important to ensure the sustainability of the provincial tourism industry. Following a successful 2020 marketing campaign, Tourism Nova Scotia will support the \$1.2 billion tourism revenue goal through a local marketing campaign that will inspire Nova Scotians to explore their own province. Tourism Nova Scotia will seek to divert travel spending that has traditionally left the province and encourage Nova Scotians to spend more at home in 2021. In addition, if conditions permit, Tourism Nova Scotia will activate a regional marketing campaign to attract travellers from within Atlantic Canada to visit Nova Scotia.

Tourism Nova Scotia will work with tourism businesses and organizations to develop and market packages that will entice locals to spend more of their travel dollars in the province. The RADIATE Tourism Program supports businesses in their development and social media marketing of travel packages that will be available across all four seasons. In addition to helping tourism businesses generate immediate demand, this program will position Nova Scotia operators to capture even more business when travel conditions improve, which is critical to tourism recovery.

Tourism Nova Scotia's customer-facing website, NovaScotia.com, will continue to be the go-to website for travellers seeking information on the wealth of things to see and do in Nova Scotia, as well as information related to COVID-19 regulations. Content on NovaScotia.com was continuously updated in 2020 to reflect operating conditions and provide relevant content for Nova Scotia travellers; this will continue in 2021-22. As well, content on NovaScotia.com will continue to reflect evolving consumer behaviour and preferences and highlight tourism assets and experiences that align with consumer demand.

Adaptation

COVID-19 has significantly affected the tourism landscape. In response to evolving operating conditions and consumer behaviour, Tourism Nova Scotia will work with the Tourism Stabilization Working Group and the broader hospitality and tourism sector organizations in support of the \$1.2 billion tourism revenue goal. The focus will be on helping tourism businesses and organizations adapt to take advantage of available and emerging opportunities to inform tourism industry recovery.

Strategic Marketing – Migration Focus

The attraction of remote workers, both permanent (lifestyle migrants) and transitory (digital nomads), supports the provincial government population growth priority, and specifically, the goal to attract remote workers to Nova Scotia in 2021.

Building on activities launched in December 2020 to attract remote workers, Tourism Nova Scotia will continue to inspire consideration of Nova Scotia among those wishing to relocate for work or lifestyle reasons on a temporary or permanent basis.

Remote worker attraction extends beyond Tourism Nova Scotia, with NSBI, Innovacorp, Events East Group, and Develop Nova Scotia working to amplify messaging and maximize Nova Scotia communities' potential to attract remote workers. Tourism Nova Scotia will work with non-government organizations that have connections to Canadians that have potential to move to the province, to share content and amplify the "come to Nova Scotia" messaging.

Strategic partnerships are key to the successfully attracting remote workers to the province. In addition to working collaboratively with the Crown corporations, Tourism Nova Scotia will explore non-traditional partnerships with the private sector to support remote worker attraction.

Long-stay Travellers

In support of the provincial goal to attract remote workers, Tourism Nova Scotia will work with tourism businesses and organizations such as RANS, HANS, regional DMOs, Wine Growers Nova Scotia and the Craft Brewery Association of Nova Scotia to develop the types of long-stay accommodations-based packages that digital nomads seek. Tourism Nova Scotia will work with tourism businesses to develop and market compelling packages that will encourage travellers from outside Nova Scotia to purchase quarantine-enhancing experiences while respecting public health protocols. This will include providing self-isolating visitors with unique ways to access Nova Scotia's rich culinary, cultural and performing arts offerings.

Digital Transformation

Digital competency is no longer a 'nice-to-have' for Nova Scotia's tourism industry, but a 'must-do'. In 2020-21, Tourism Nova Scotia launched its successful Tourism Digital Assistance Program (TDAP) in partnership with Digital Nova Scotia. This program, aimed at helping tourism

businesses adapt their digital presence to align with evolving consumer behaviour, will be offered again in 2021-22.

Tourism Nova Scotia will continue its webinar series, providing tourism businesses and organizations with relevant information and coaching related to increasing industry capacity and enhancing business readiness with a focus on topics such as digital marketing and content development.

For those businesses that will benefit from an intensive website improvement experience, Tourism Nova Scotia's Website Bootcamp will pair eligible businesses with digital consultants to enhance or develop effective digital marketing and e-commerce tools.

The Digital Content Marketing Program, adapted in 2020-21 to reflect current conditions, allows businesses and communities to co-invest with Tourism Nova Scotia to develop marketing assets and extend their reach through customized digital advertising and/or content asset development activities. This program helps participants increase their capacity to market in the digital environment.

Four Season Tourism

Year-round tourism will help "future-proof" the provincial tourism industry by providing a reliable source of tourism revenues all year. Working with the Tourism Stabilization Working group, DMOs, sector organizations and other tourism partners, Tourism Nova Scotia will focus marketing and sector development resources to help build the provincial inventory of compelling fall/winter products and experiences to entice travellers to experience the province during off-peak months. It is expected that Nova Scotians will be the initial targets for these seasonal tourism development activities.

Quality

Quality remains a critical success factor for Nova Scotia's tourism industry and is even more important in the COVID-19 world, as Nova Scotia works to adapt to meet consumer expectations and compete against other destinations. In partnership with TIANS, Tourism Nova Scotia remains committed to working with tourism businesses and organizations to enhance their ability to attract visitors and meet/exceed their expectations, and to ensure businesses are equipped to meet the needs of the range of travellers, including those with accessibility requirements.

Tourism Nova Scotia will work to meet or exceed the requirements of the Accessibility Directorate in support of the provincial goal of an accessible Nova Scotia by 2030.

Doers and Dreamers Travel Guide

In response to changing consumer behaviour, in 2021-22 Tourism Nova Scotia is piloting a digital-only version of the Doers and Dreamers Travel Guide. The digital version will be available to download and, as it may be edited in real time, will allow tourism businesses and organizations to maintain up-to-date information and add new products and experiences as they are developed. Flexibility to be able to edit listings is critical in these rapidly changing times.

Visitor Services

Tourism Nova Scotia, in collaboration with Develop Nova Scotia will work to innovate and update the visitor servicing model.

Recovery

Tourism Nova Scotia will work to attract short-term visitors from further away markets when public health guidelines permit.

Experience Development

Experience development activities seek to advance the quality and range of experiences offered by provincial tourism businesses and organizations.

Tourism Nova Scotia will continue its work to expand the inventory of experiences that reflect the province's rich cultural heritage. This includes advancing Indigenous-led, Acadian and African Nova Scotian experience development, including capturing high-quality images/video to be ready for promotion and sales in 2022. In addition, Tourism Nova Scotia will work with key cultural tourism attractions to develop/enhance new experiences that will diversify offerings and motivate visitation.

Tourism Nova Scotia's EXCELLerator program, designed to help operators create "wow" experiences that appeal to Free Spirit travellers, was suspended in 2020. In 2021-22, Tourism Nova Scotia will work with EXCELLerator partners from the 2020 participant group to develop their experiences and support content creation to launch these experiences in 2022.

Events and Conventions

Tourism Nova Scotia creates the brand that is leveraged by sector organizations in their attraction of events, meetings and conventions, and works with sector organizations on asset creation, visitor servicing support, and encouraging pre/post visitation around the province.

COVID-19 and associated restrictions on gathering limits significantly constrained the province's ability to host events and conventions in 2020. Tourism Nova Scotia will work collaboratively with Events East Group, Events Nova Scotia and Discover Halifax to develop a marketing plan that will help position Nova Scotia for the return and recovery of events and conventions.

Strategic Marketing – Travel Focus

When conditions permit, Tourism Nova Scotia will execute consumer advertising campaigns to inspire short-term visitation from domestic markets outside of Atlantic Canada. Tourism Nova Scotia will monitor travel conditions and restrictions, as well as tourism demand, and activate advertising campaigns accordingly.

Under the assumption that international visitation will be restricted until at least Q1 2022-23, Tourism Nova Scotia will develop an international tourism recovery marketing plan for approval by the Department of Inclusive Economic Growth. In keeping with the travel trade planning cycle, the plan will include details on how Tourism Nova Scotia staff will work with key international tour operators, travel agencies and media in these markets to keep Nova Scotia top-of-mind and build travel demand for 2022, and search engine marketing (SEM) tactics to ensure Nova Scotia shows up when travellers are dreaming about where to travel in 2022.

Travel Media

Tourism Nova Scotia's media relations strategy evolved in 2020-21 to reflect COVID-19 operating conditions. In 2021-22, the focus will be on local and other Canadian travel writers travelling around the province, writing compelling stories about Nova Scotia's places and experiences. When markets open and public health is supportive of travel, this will expand to

include markets that hold the greatest potential. Tourism Nova Scotia will continue to attend travel media marketplaces virtually, to keep Nova Scotia top-of-mind with travellers in further away markets.

[Atlantic Canada Agreement on Tourism \(ACAT\)](#)

Throughout the mitigation, adaptation and recovery phases, Tourism Nova Scotia will co-invest with the Atlantic Canada Opportunities Agency (ACOA) and the Atlantic provinces in marketing and development activities that align with provincial and federal tourism priorities.

[Strategic Research](#)

Tourism Nova Scotia research will support industry mitigation, adaptation and recovery by informing and supporting marketing, industry development and communications initiatives and working with industry partners to inform and complete research initiatives. Research will enhance understanding of the remote worker opportunity, the development of long-stay packages, identification and confirmation of emerging traveller segments, understanding quality through the lens of the visitor, and inform marketing campaigns.

[Communications and Stakeholder Engagement](#)

Tourism Nova Scotia's communications and stakeholder engagement priorities for 2021-22 include sharing information and opportunities with Nova Scotia tourism businesses to assist in their recovery efforts; engaging with stakeholders to help them understand and align with provincial government priorities, and helping to rebuild Nova Scotia's tourism confidence.

In advance of its summer marketing campaign, TNS will launch a communications campaign targeted at Nova Scotians designed to encourage support for, and confidence in, Nova Scotia's tourism industry.

PERFORMANCE MEASURES

Tourism Nova Scotia works to maximize the value of tourism to the province. In 2021-22, Tourism Nova Scotia will develop performance measures that reflect the organization's contribution to the industry goal of achieving \$1.2 billion in tourism revenues in 2021 through mitigating the impacts of the pandemic and related public health orders, helping industry operators adapt to current and evolving operating conditions, and supporting sustainable industry recovery. These performance measures may not be strictly financial in nature; they will consider how tourism contributes to the quality of life and well-being of Nova Scotians.

Tourism Nova Scotia will ensure that resources are aligned against government's strategic priorities. Progress against 2021-22 activities and their effectiveness will be tracked and reported.

Tourism Nova Scotia Strategic Area of Focus	Priority/Activity/Initiative	Expected Outcome
Industry Support	Provide administrative support for mitigation programming Ensure DMO operational continuity DCMP and RADIATE programs	Contribute to tourism and hospitality businesses' and organizations' ability to remain operational
Generate local travel to support industry \$1.2 billion tourism revenue goal	Local (and regional) marketing campaign across all four seasons Package development Novascotia.com content DCMP program	Industry is better prepared to attract local travellers across all four seasons Contribute to increased tourism revenues Increase in off-peak tourism
Strategic Marketing – Migration Focus	Marketing campaign and website to attract remote workers Collaboration to amplify distribution of “come to Nova Scotia” messaging	Contribute to government goal of attracting remote workers

Strategic Marketing – Migration Focus	Digital nomad long-stay accommodations-based package development	<p>Contribute to government goal of attracting remote workers</p> <p>Contribute to increased tourism revenues</p> <p>Larger collection of experiences/packages will motivate travel and attract remote workers.</p>
Digital Transformation	<p>Tourism Digital Assistance Program</p> <p>Webinar series</p> <p>Website Bootcamp Program</p>	<p>Increased digital readiness among tourism businesses to attract customers and increase revenues</p> <p>New/enhanced business websites</p>
Experience Development	<p>RADIATE Tourism Program</p> <p>Coaching</p> <p>Development of tourism differentiators</p> <p>Four season tourism</p> <p>Quality enhancement</p>	<p>Contribute to increased tourism revenues</p> <p>Increased business capacity to:</p> <ul style="list-style-type: none"> -offer off-peak products and experiences -align products with market opportunities -meet/exceed customer expectations <p>Nova Scotia has distinct authentic experiences that differentiate it from other destinations</p>
Strategic Research	Various initiatives to support strategic decision making, including remote worker attraction and alternate customers/markets	Tourism Nova Scotia and stakeholders use research support to inform decision making
Communications and Stakeholder Engagement	<p>Confidence campaign</p> <p>Various initiatives to share information and opportunities with Nova Scotia tourism businesses to assist in their recovery efforts, engage with stakeholders to help them understand and align with provincial government priorities, and help to rebuild Nova Scotia’s tourism confidence</p>	<p>Stakeholders understand and agree with Tourism Nova Scotia’s strategic direction</p> <p>Stakeholders believe Tourism Nova Scotia communicates information, opportunities and programs in a timely and transparent manner</p> <p>Nova Scotians consider tourism to be important to the provincial economy</p>

<p>Strategic Marketing – Travel Focus</p>	<p>Initiatives will depend upon available opportunities, reflecting the impact of COVID-19</p>	<p>Contribute to increased tourism revenues</p> <p>Focus on markets with the highest potential to drive tourism recovery – as they evolve</p> <p>Remain connected with established Canadian and international markets to ensure they do not erode</p> <p>Implement ACAT agreement</p>
<p>Visitor Services</p>	<p>Innovate and update visitor services</p>	<p>Develop plan with DNS</p>

BUDGET CONTEXT 2021-22

OPERATING BUDGET

	2020-21 Estimate (\$)	2020-21 Forecast (\$)	2021-22 Estimate (\$)
Revenue			
Provincial Operating Grant	21,648,000	25,763,000	20,671,000
Tourism Recoveries	550,000	4,549,200	1,604,000
Tourism Fees & Charges	763,000	(248,700)	100,500
Total Revenue	22,961,000	30,063,500	22,375,500
Expenses			
CEO & Board Administration	372,100	341,700	380,800
Corporate Services	5,033,600	3,862,900	4,545,100
Communications	523,000	444,700	514,000
Research and Policy	1,069,400	963,300	1,070,400
Marketing	13,149,800	14,952,800	12,091,400
Sector Development	2,813,100	9,498,100	3,773,800
Total Expenses	22,961,000	30,063,500	22,375,500
Surplus (Deficit) before Depreciation	0	0	0
Depreciation Expense	0	49,400	24,700
Surplus (Deficit)	0	(49,400)	(24,700)

APPENDIX A: HYPERLINKS TO ADDITIONAL INFORMATION

Corporate Governance

Tourism Nova Scotia is led by a private sector board of directors consisting of industry and business leaders from across Nova Scotia. Directors are elected to the board based on a nomination process. Tourism Nova Scotia's Chief Executive Officer reports to the Chair of the board of directors. The Chair reports to the Minister of Inclusive Economic Growth.

<https://tourismns.ca/about-us/corporate-overview/governance>

Responsibility of Tourism Nova Scotia Board Chair

<https://tourismns.ca/sites/default/files/Responsibilities%20of%20the%20Board%20Chair.pdf>

Responsibility of Tourism Nova Scotia Board Members

https://tourismns.ca/sites/default/files/Responsibilities%20of%20Individual%20Directors_0.pdf

Tourism Nova Scotia Board Charter

<https://tourismns.ca/sites/default/files/Board%20of%20Directors%20Charter.pdf>

Governance Committee:

- Nathalie Megann, Chair
- Lisa Bugden
- Ron Chisholm
- Ian McKinnon

Audit and Risk Committee:

- Miles Sweeney, Chair
- Neil Black
- Pat Lyall

Tourism Nova Scotia Senior Management Team

<https://tourismns.ca/about-us/corporate-overview/leadership-team>

Significant Reporting Relationships

Tourism Nova Scotia's CEO reports to Tourism Nova Scotia's Board of Directors.

The management and control of the affairs of the Corporation are vested in the Board of Directors and the Board may, subject to this Act, exercise the powers of the Corporation

Organizational Overview

Enabling Statute

<https://tourismns.ca/sites/default/files/2017-01/Tourism%20Nova%20Scotia%20Act.pdf>

Mandate

The Tourism Nova Scotia Act, passed on May 4, 2015, states the objects of the corporation are to:

- achieve tourism growth in the province and maximize the value of tourism to the economy of the province
- develop and implement a long-term strategy for tourism to drive sustainable tourism in the province that delivers growth and profitability in the tourism industry, provides economic benefit to the province, and is consistent with the province's strategic priorities
- communicate and collaborate with communities, private industry, and the tourism industry in the province

Vision

To be recognized globally as the leading destination marketing organization.

Values

Tourism Nova Scotia is guided by three core values:

- act with integrity
- collaborate to achieve common goals
- embrace our vision to be the leading destination marketing organization

Business Areas

- Marketing
- Experience Development
- Business Coaching
- Research
- Accommodation Licensing
- Six Visitor Information Centres
- Contact Centre