

# DRIVING EXPORT REVENUE

2017-2022  
STRATEGIC PLAN

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TOURISM  
NOVA SCOTIA 

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# LETTER FROM THE CHAIR & CEO

After much transition in our industry, and the establishment of Tourism Nova Scotia as a Crown corporation in April 2015, we are pleased to present Tourism Nova Scotia's 2017-2022 strategic plan: *Driving Export Revenue*. The plan provides context and rationale for how we will partner and invest our resources to drive tourism growth. It also outlines how various tourism stakeholders are involved in growing the tourism sector and the role all Nova Scotians can play to grow Nova Scotia's tourism economy.



R. Irene d'Entremont  
Chair, Tourism Nova Scotia

Tourism is one of the world's fastest growing industries and has been identified as one of Canada's most important economic opportunities for the 21st century. The potential for Nova Scotia to attract visitors from around the globe has never been greater in this age of digital advertising and values-based travel. Our pristine landscapes, accessible seacoast, diverse culture, rich heritage, and authentic seafood and culinary experiences are top considerations for people when they book a trip to Nova Scotia. We are a naturally appealing destination, but we must continue to enhance ways for people to experience the province and give visitors more opportunities to spend money while they are here.

As the global tourism industry becomes increasingly competitive, Tourism Nova Scotia will use visitor research and destination marketing trends to develop our annual tactical plans. We will share information with industry and coach partners on ways to enhance



Michele Saran  
CEO, Tourism Nova Scotia

their offerings to drive revenue growth. We will work with federal, Atlantic Canadian, and provincial government partners to maximize our marketing reach within Canada and internationally, and amplify Nova Scotia's brand as a travel destination. Through co-investment with industry, collaboration, and accountability, we will lead tourism growth in the province and help develop a more sustainable tourism industry for the benefit of all Nova Scotians.

2016 was Nova Scotia's best tourism year on record. More than 2.2 million visitors came to the province, and tourism revenues increased by \$125 million over 2015 to an estimated \$2.6 billion. In 2010, tourism revenues of \$2 billion generated \$131 million in provincial tax revenues. Doubling provincial tourism revenue by 2024 will result in a significant increase in provincial tax revenues. The road to \$4 billion by 2024 is steep, but achievable if all industry partners work together and make the strategic investments necessary to get us there.

Sincerely,

R. Irene d'Entremont, C.M., D. Comm. h.c.,  
Chair, Tourism Nova Scotia

Michele Saran, CEO, Tourism Nova Scotia



# TOURISM NOVA SCOTIA GOVERNANCE

Tourism Nova Scotia is led by a private sector board of directors consisting of 10 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 (CEO) reports to the chair of the board of directors. The chair reports to the minister of business.



## 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 sector, 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.

## MISSION

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

## VISION

To be recognized globally as the leading destination marketing organization.



# EXECUTIVE SUMMARY

The 2014 “Now or Never” report authored by the Nova Scotia Commission on Building our New Economy, commonly referred to as the Ivany Commission (see Appendix), challenged Nova Scotians to change their ways for the betterment of the province. Tourism was identified in the report as critical to the economic success of Nova Scotia. The goal set for the tourism industry was to double annual tourism revenues from \$2 billion in 2010 to \$4 billion by 2024. At the time of publication in 2014, growth signs were positive, but it was clear that Nova Scotia’s approach would need to change to truly maximize tourism’s impact on Nova Scotia’s economy. The following year, Tourism Nova Scotia was established as a private sector-led Crown corporation to achieve tourism growth in the province, and lead the industry toward the goal of doubling annual tourism revenues to \$4 billion by 2024.

Significant work has been done in the past two years to establish the Crown and develop a strategic plan that will drive transformational growth of the industry.

Four strategic pillars guide Tourism Nova Scotia’s efforts and investments in marketing, sales, sector development, and corporate communication.

**STRATEGIC PILLARS**

- 1. ATTRACT FIRST-TIME VISITORS
- 2. INVEST IN MARKETS OF HIGHEST RETURN
- 3. FOCUS ON WORLD-CLASS EXPERIENCES
- 4. BUILD TOURISM CONFIDENCE

While Tourism Nova Scotia launched the pillars of its strategy in November 2015, *Driving Export Revenue* is Tourism Nova Scotia’s 2017-2022 strategic plan, which includes suggested roles for communities, government, and industry stakeholders.

The foundation of Tourism Nova Scotia’s corporate brand is collaboration, co-investment, and accountability. Marketing partnerships with tourism businesses and industry stakeholders, in addition to partnerships with provincial and federal government departments locally, regionally, and nationally, are essential for tourism growth. By leveraging dollars and expertise, Tourism Nova Scotia will extend its marketing reach, generate more interest in Nova Scotia, and increase the export value of Nova Scotia’s tourism industry.

A strong, productive relationship between Tourism Nova Scotia and the Tourism Industry Association of Nova Scotia (TIANS) will position the industry to rise above challenges and take advantage of opportunities. All stakeholders have much to gain by working together to tackle issues related to accommodations quality and capacity, product development, extending the tourism season, and improving access to Nova Scotia from priority tourism markets.

Tourism Nova Scotia’s five-year strategic plan is focused on attracting more non-resident, higher-yield visitors to the province to drive sustainable growth and profitability for Nova Scotia’s tourism industry.

# THE GOAL: \$4 BILLION BY 2024

In 2014, the Nova Scotia Commission on Building our New Economy conducted research and held public consultations across Nova Scotia in pursuit of ideas to create a brighter, more sustainable economic future for Nova Scotia.

The commission, comprised of respected leaders from diverse backgrounds and communities throughout Nova Scotia, published a report called *Now or Never: An Urgent Call to Action for Nova Scotians*. The report asks Nova Scotians to come together and focus on one common goal, with each person and sector doing what they can to positively shift the province’s economic and social potential, which is threatened by a diminishing fiscal situation and aging demographics. One of the main messages in the report is that Nova Scotians must

stop relying on government to solve our challenges. We must shift our attitudes and come up with new ways of doing things.

The report challenged several sectors and industries in the province to act, and identified a specific goal for Nova Scotia’s tourism industry.

**GOAL #14: TOURISM EXPANSION**

**AS NOVA SCOTIA’S LEADING SOURCE OF SERVICE SECTOR EXPORTS, GROSS BUSINESS REVENUES FROM TOURISM WILL REACH \$4 BILLION BY 2024.**

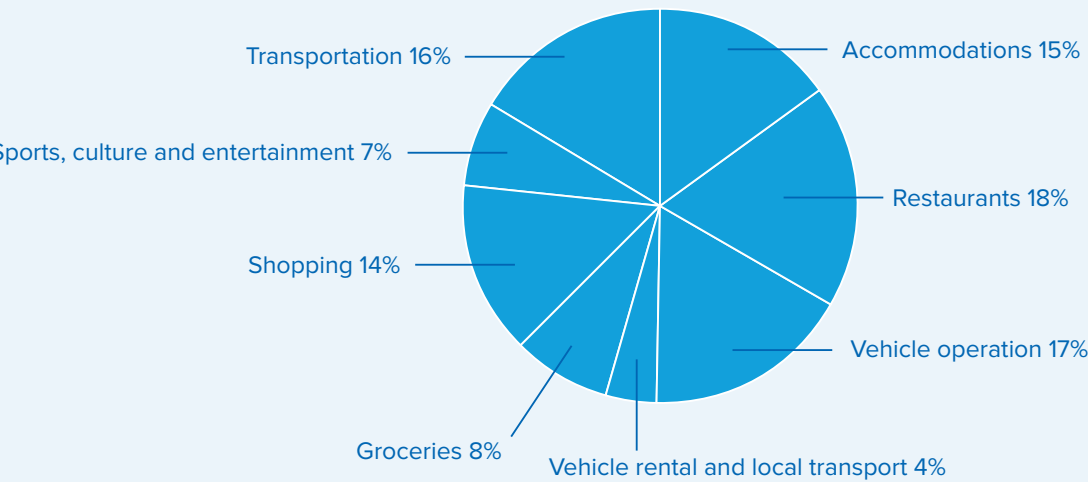




# TOURISM DEFINED

The United Nations World Tourism Organization (UNWTO) defines tourism as “... a social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/ professional purposes. These people are called visitors (residents or non-residents) and tourism has to do with their activities, some of which imply tourism expenditure.” Tourism is a multi-dimensional industry, with visitor spending occurring across many sectors.

## 2013 NOVA SCOTIA TOURISM REVENUES BY SECTOR



# ROLES

Role clarity, leadership, and collaboration are key to achieving industry growth and reaching revenue targets. To avoid redundancy and optimize resources, roles and responsibilities associated with the tourism industry must be clearly articulated, and mandates aligned. The following stakeholder groups directly impact Nova Scotia’s ability to achieve \$4 billion in tourism revenues by 2024.



## TOURISM NOVA SCOTIA’S ROLE

Tourism Nova Scotia’s role is focused on marketing and sector development initiatives that will motivate pleasure travellers to visit and spend their vacation dollars in Nova Scotia. Through its annual marketing campaigns, contact centre, and NovaScotia.com, Tourism Nova Scotia generates awareness and consideration of Nova Scotia, and provides trip planning

information to prospective visitors. Through partnership programs, sharing of information, and coaching, Tourism Nova Scotia helps industry operators and organizations enhance product and experience offerings, implement new revenue-generating strategies, and leverage marketing investments in key target markets. By communicating stories of innovation and success in Nova Scotia’s tourism industry, Tourism Nova Scotia works to boost tourism confidence.





# INDUSTRY’S ROLE

The role of tourism operators and businesses is to offer the types of experiences and products visitors want, and to make cash registers ring. Industry operators are uniquely positioned to close the sale pre-trip and during-trip.

Visitors want and expect more from a tourism purchase. They are in search of unique, quality experiences, and an emotional connection to the place they are visiting. It is the role of industry operators and businesses to

offer these experiences and drive repeat visitation by delivering on visitor expectations.

Tourism Nova Scotia is committed to helping interested industry stakeholders gain an understanding of the types of visitors being targeted and what those visitors are interested in purchasing. With this insight, operators can improve their current offerings and implement new revenue-generating ideas.



Close the sale pre-trip and during-trip



Drive repeat visitation by exceeding visitor expectations



Invest in product



Deliver world-class experiences

# COMMUNITY’S ROLE

Community is comprised of municipalities, regional destination marketing organizations, regional tourism industry associations, and community-based organizations with tourism interests. Community also includes Nova Scotia residents. Personal interactions with Nova Scotians are critical to the visitor experience and they influence the desire of visitors to return to Nova Scotia and recommend Nova Scotia as a vacation destination.

Community stakeholders are uniquely positioned to plan, innovate, and collaborate with local tourism operators and businesses to welcome tourism in their areas. Communities that choose to be in the tourism business by creating compelling, visitor-friendly destinations will have the greatest opportunity to attract visitors and tourism investment.

Another important role for communities is visitor servicing. Being mindful of the needs of visitors and offering size-appropriate amenities, such as parking and public washrooms, is important. Community and industry stakeholders have a role in helping residents understand the value of tourism, while arming them with information about experiences, events, and attractions so they can better service visitors. Tourism Nova Scotia is committed to supporting visitor servicing.



Visitor servicing



Partnering with industry to deliver destination development and marketing





# GOVERNMENT’S ROLE

All levels of government enable tourism growth by implementing policies and making investments in programs and infrastructure that will improve the operating environment for tourism businesses. It is important to understand tourism trends, consumer behaviour, and visitor expectations when making decisions, to enhance Nova Scotia’s competitiveness

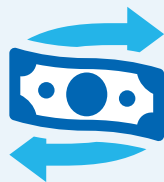
as a tourism destination. Competitiveness leads to more visitation and increased investment in new or existing tourism businesses. Many government departments and Crown corporations have mandates that can affect or assist with industry growth. Tourism Nova Scotia will liaise with these entities to share opportunities that will help advance the economic goals of the province (see Appendix).



Consider policy agenda in support of goal



Community economic development



Attraction of inward development



Infrastructure development



# TOURISM INDUSTRY ASSOCIATION OF NOVA SCOTIA’S ROLE

The role of the Tourism Industry Association of Nova Scotia (TIANS) is to be the “voice of tourism” and lead the advancement of the industry. TIANS is the advocacy organization that supports and champions emerging issues, while encouraging policy improvements, innovation, and quality enhancement (see Appendix).

IT IS IMPORTANT TO UNDERSTAND TOURISM TRENDS, CONSUMER BEHAVIOUR, AND VISITOR EXPECTATIONS IN ORDER TO MAKE DECISIONS THAT ENHANCE NOVA SCOTIA’S COMPETITIVENESS AS A TOURISM DESTINATION.



# SITUATIONAL ANALYSIS

The United Nations World Tourism Organization (UNWTO) identifies tourism as “...one of the fastest growing economic sectors in the world.” According to the UNWTO, tourism accounts for 10% of global gross domestic product (GDP), and for many developing countries, tourism is the most important sector. In 2016, global tourism increased by 3.9% and accounted for \$1.4 trillion USD in revenues.

## VISITATION

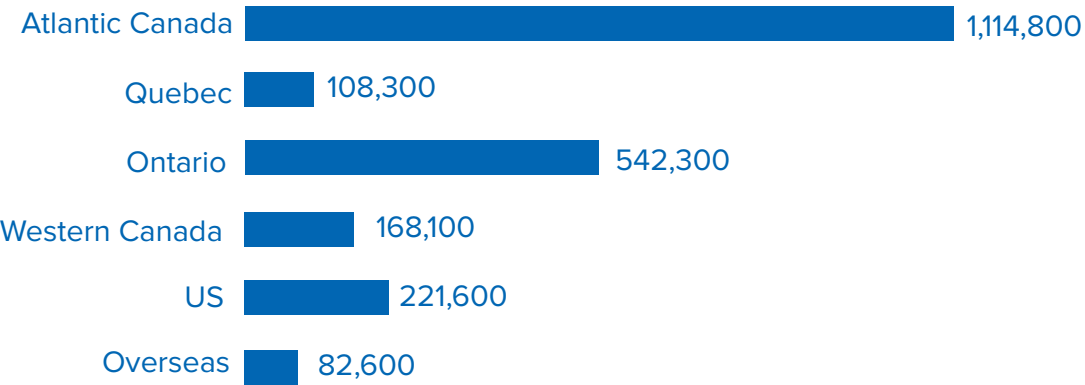
Tourism is big business in Canada. In 2016, international arrivals to Canada increased by 11%, well above the global average (source: Statistics Canada).

In Nova Scotia, visitors from other Canadian provinces account for most non-resident visits. In 2016, visits to Nova Scotia by international travellers (United States

and overseas) increased by 10%, on par with the national average.

Tourism is an important and growing export industry for Nova Scotia. 2016 was the third consecutive year of non-resident visitation growth to the province. Non-resident visitation growth for 2016 reached 8%, an increase of 168,700 non-resident visitors.

## 2016 NON-RESIDENT OVERNIGHT VISITORS TO NOVA SCOTIA BY ORIGIN



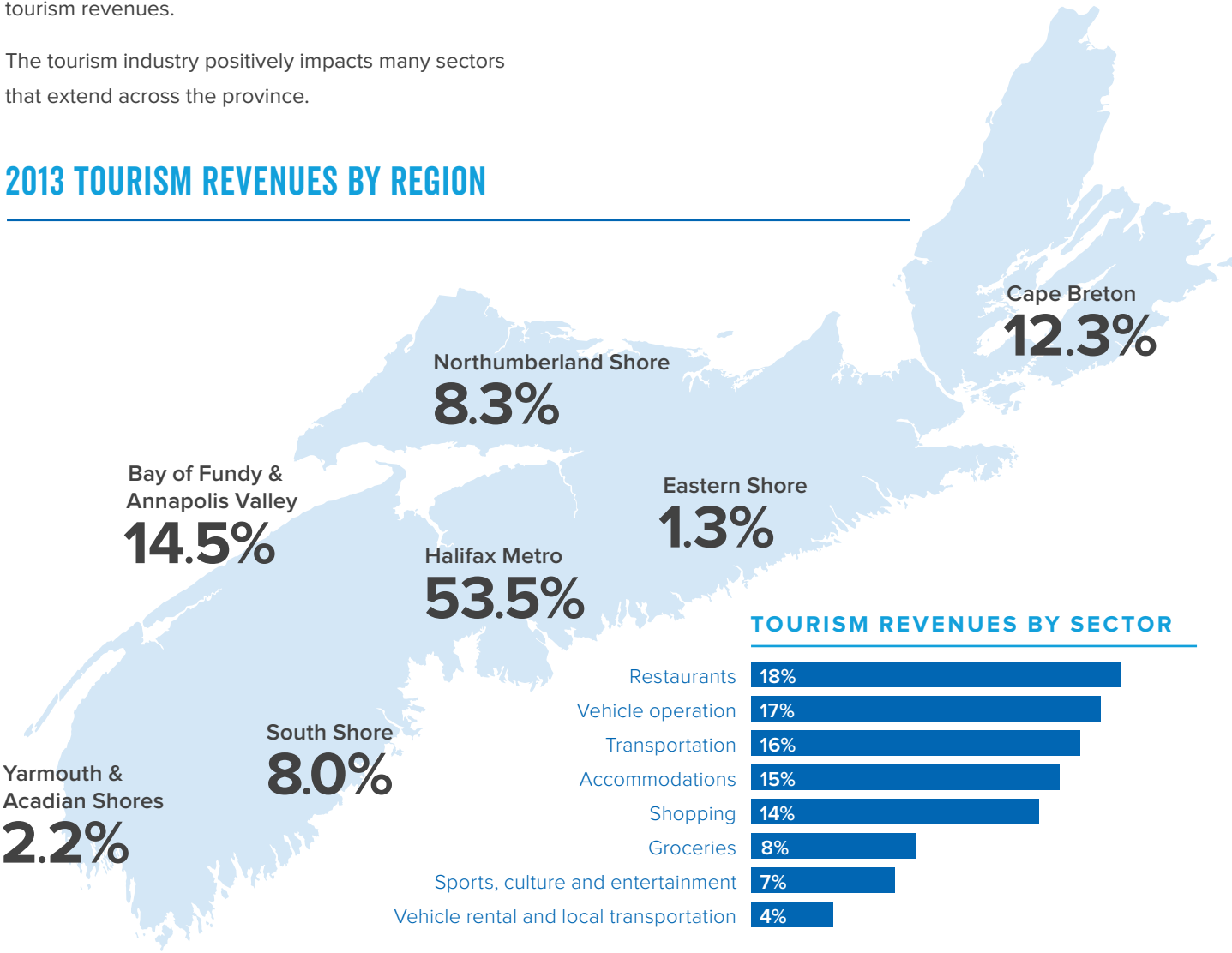
## REVENUES

Tourism in Canada generated approximately \$92 billion in tourism revenues in 2016 (source: Statistics Canada).

Nova Scotia’s tourism revenues for 2016 are estimated at \$2.6 billion and represent approximately 3% of national tourism revenues.

The tourism industry positively impacts many sectors that extend across the province.

## 2013 TOURISM REVENUES BY REGION



## TOURISM IMPACTS\*

	2010 ESTIMATE	2016 ESTIMATE	CHANGE	2024 PROJECTION
Tourism revenues	\$2.0 billion	\$2.6 billion	+\$575 million	\$4 billion
Provincial taxes (direct + spin-off)	\$131 million	\$168 million	+\$37 million	\$260 million
Tourism-related GDP	\$722 million	\$928 million	+\$206 million	\$1.4 billion

\*These are Tourism Nova Scotia’s estimates and are not Nova Scotia Department of Finance and Treasury Board figures.



# VISITATION AND SPENDING TARGETS BY MARKET

The table below illustrates the number of visitors by market, as well as the premium required (adjusted for inflation), for Nova Scotia to achieve \$4 billion in tourism revenues in 2024.



## \$4 BILLION GOAL ASSUMPTIONS:

- Base case is 2010 tourism revenues of \$2.02 billion.
- Gross tourism revenues will reach \$4 billion by 2024.
- Per visitor spend is based on 2010 data expressed in 2024 dollars (with inflation assumed at 2%).
- All revenue growth will come from export markets, with increased focus on high-yield markets.
- Revenue from Nova Scotia residents and same-day visitors remains constant (adjusted for inflation).
- Exchange rates (status quo, based on 2014 rate).
- Opportunity exists to increase yield/spending per visitor – premium, outside of any inflation-related increases in spending.

## VISITATION AND SPEND TARGETS BY MARKET

MARKET	2016	2024	EXPENDITURES
Atlantic Canada	1,114,800	1,114,800	10% premium
Quebec	108,300	150,000	10% premium
Ontario	542,300	700,000	10% premium
Western Canada	168,100	250,000	10% premium
US	221,600	352,000	20% premium
Overseas	82,600	130,000	20% premium
China	Minimal included in overes	50,000	20% premium

Premium: a higher amount than inflation-related increases in spending.

# GEOGRAPHY, SPEND, AND MODE OF TRAVEL

Record-breaking tourism growth in 2016 is a positive indication of growing interest in the province. However, an analysis of the visitor market shows that an 8% increase in visitation resulted in only 5% growth in tourism revenues. The level of growth and current visitor composition will need to shift to achieve the \$4 billion goal.

Where visitors come from, and how they get to Nova Scotia, has a direct impact on revenues. Atlantic Canada is Nova Scotia's biggest visitor market. However, Atlantic Canadian visitors are among the lowest spending and least likely to be influenced by Tourism Nova Scotia's advertising efforts.

Nova Scotia needs higher spending visitors to reach the \$4 billion goal. Visitors who arrive by air spend more, and improving air access to the province will continue to be a priority for Tourism Nova Scotia and industry partners. Nova Scotia has a strong competitive advantage within the region, with Halifax Stanfield International Airport attracting many international flights.



IMPROVING AIR ACCESS TO THE PROVINCE WILL CONTINUE TO BE A PRIORITY FOR TOURISM NOVA SCOTIA AND INDUSTRY PARTNERS. NOVA SCOTIA HAS A STRONG COMPETITIVE ADVANTAGE WITHIN THE REGION, WITH HALIFAX STANFIELD INTERNATIONAL AIRPORT ATTRACTING MANY INTERNATIONAL FLIGHTS.



# NOVA SCOTIA SWOT

## STRENGTHS WEAKNESSES OPPORTUNITIES THREATS

### STRENGTHS

**Size:** Nova Scotia is a small province with iconic tourism sites and experiences, and breathtaking scenery throughout. Unlike larger provinces or states, the entire province, with all its regions and attractions, is a vacation experience.

**Seacoast:** Nova Scotia has 13,300 kilometres of pristine and accessible coastline. Research shows that many people come to Nova Scotia to explore the seacoast, beaches, and ocean. From whale watching to coastal hiking and biking, to kayaking, surfing, fishing, sailing and swimming, Nova Scotia's accessible coast offers many opportunities for tourism operators and visitors.

**Safety:** Nova Scotia is a peaceful destination with health, safety, and security measures in place to protect visitors.

**Diversity:** Nova Scotia has a diverse geography and offers a range of culinary, outdoor, and cultural experiences in both urban and rural settings.

**Accessibility:** Nova Scotia is accessible by air, boat, road, and rail at various entry points throughout the province. Halifax Stanfield International Airport is Atlantic Canada's largest airport, attracting many international flights. Visitors can choose how they wish to travel to Nova Scotia.

**Engaged industry:** Industry partners recognize the importance of tourism to the provincial economy.

**Broad impact:** Tourism touches all regions of the province, contributing to both urban and rural economies.

**Strong repeat visitation:** Research shows that once visitors experience Nova Scotia, many return.

### WEAKNESSES

**Accommodations capacity:** As visits to Nova Scotia increase, more accommodations that meet the needs of visitors will be required, particularly in rural areas that are focused on tourism growth.

**Aging infrastructure:** Aging accommodations, mainly outside of Halifax, and poor road conditions in some areas of the province impact visitor experience and can discourage visitation.

**Labour:** An aging population and out-migration are continuing to affect the availability of employees in the tourism industry. The seasonal nature of tourism in Nova Scotia makes it difficult for operators to attract and retain employees.

**Seasonality:** Currently, Nova Scotia's peak tourism season is June to September. For many operators, the seasonal nature creates challenges relating to labour attraction and retention, and profitability.

**Air capacity:** Nova Scotia needs more high-yield visitors (visitors that spend more) from overseas markets to reach the \$4 billion goal. This increase can only be realized with improved air access.

**Quality product:** Nova Scotia requires higher-end accommodations and experiences to attract more high-yield visitors. Higher quality offerings have the potential to open new markets for Nova Scotia.

**Public transportation:** Public transportation options are limited for visitors wishing to travel outside urban centres.

### OPPORTUNITIES

**Awareness:** There is a significant opportunity to drive awareness of Nova Scotia's tourism brand in international markets.

**Canada brand:** Nova Scotia can leverage the strength of Canada's brand and reputation as a safe and welcoming destination.

**China:** China is Canada's fastest growing market. There is significant potential for Nova Scotia to attract visitors from China based on our product offering. Nova Scotia is also just a short flight for Chinese visitors entering Canada via Montreal or Toronto.

**Exchange rate:** The current value of the US dollar has the potential to prompt more visitation from the US and spur Canadians to travel within their own country.

**Extend the tourism season:** A longer tourism season fueled by events, meetings and conventions, and innovative product and experiences will enable greater profitability and growth within the industry.

**Partnerships:** Nova Scotia can extend marketing reach and drive tourism growth through strategic public and private sector partnerships.

**Policy alignment:** Government can consider changes to policy to support the achievement of tourism goals.

**Accommodations capacity:** Nova Scotia has the opportunity to learn from and adjust to sharing economy platforms, like Airbnb, to meet visitor demands and expectations for accommodations.

### THREATS

**Economic volatility:** Changes to the value of the Canadian dollar and to the price of gas may impact visitation to Nova Scotia and the province's ability to reach \$4 billion in tourism revenues by 2024.

**Lack of strategic alignment:** Tourism Nova Scotia's strategy relies on collaboration from provincial tourism stakeholders. Without their strategic alignment and cooperation, goals may not be met.

**Insufficient marketing investment:** Without significant investment in marketing efforts, attracting the first-time, high-spend visitors that Nova Scotia needs to reach \$4 billion in tourism revenues by 2024 will be challenging.

**Cost of air travel:** Arriving to Nova Scotia by air can be costly. Flights that are priced too high may deter travel to the province.

**Price competitiveness:** The price of tourism products, services, and experiences may rise to stay competitive as demand increases. Rising prices may discourage some travellers from planning trips to Nova Scotia.

**Global affairs:** International incidents, such as war, violence, political unrest, or terror, may affect travel to Canada and Nova Scotia.

**Natural disasters:** The occurrence of extreme weather events around the globe could impact the transportation routes, including air, ferry, and road, upon which Nova Scotia's tourism industry depends for bringing non-resident visitors to the province.



# THE PLAN



As a provincial Crown corporation, Tourism Nova Scotia has made bold changes necessary for industry and revenue growth to occur. The organization's resources are aligned around four strategic pillars.

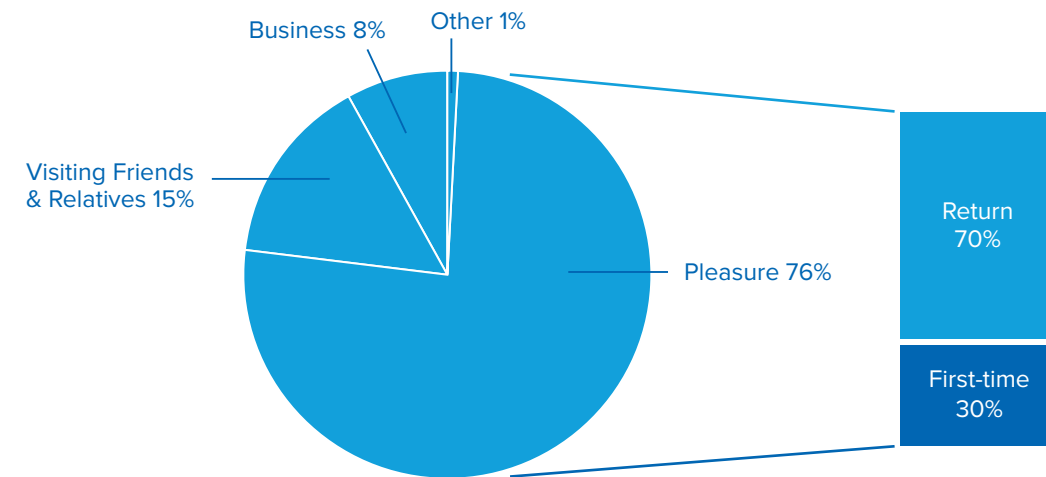
## PILLAR 1: ATTRACT FIRST-TIME VISITORS

While all visitors are important, Tourism Nova Scotia's advertising messages and execution will focus on converting those who haven't been to the province before – the first-time visitor. Research demonstrates that first-time visitors spend more in Nova Scotia – \$1,900 compared to \$1,325 for a

repeat visitor (source: 2010 Visitor Exit Survey, per party per trip spending.) A marketing strategy targeting first-time visitors ensures resources and budgets are optimized to generate measurable, incremental visitation and revenue growth.

In 2015, close to one-half of all visitors to Nova Scotia (first-time and return) were pleasure visitors. Pleasure visitors are most easily influenced by Tourism Nova Scotia's marketing activities. Other visitors may come to Nova Scotia for business or to visit family or friends. In these instances, Tourism Nova Scotia's marketing efforts are less likely to be a key factor in their decision to visit.

## PURPOSE OF TRIP AMONG FIRST-TIME VISITORS



Source: 2015 Nova Scotia Visitor Exit Survey

## MEETINGS AND CONVENTIONS

The meetings and conventions sector is an important source of visitation and revenue for Nova Scotia. The effort to attract first-time visitors through meetings and conventions to Nova Scotia is led by Events East and Discover Halifax, as well as businesses with meeting and convention facilities. In 2015, 4% of non-resident visitor parties to Nova Scotia reported the purpose of their trip was to attend a conference, convention, or trade show. Pre- and post-conference activity has the potential to generate additional tourism spending from meeting and convention delegates and drive leisure business to all parts of the province. Tourism Nova Scotia has researched this sector extensively and has determined that visitors coming to the province for a meeting or convention seek information on pre-and-post options the same way a typical pleasure visitor would. Operators are encouraged to keep their listings and offers up-to-date on Tourism Nova Scotia's trip planning website, NovaScotia.com, and stay informed via Discover Halifax and Events East about upcoming programs and opportunities.

## MAJOR EVENTS

Major events are another important way to attract first-time visitors to the province. Major events generate significant immediate and long-term economic impacts for Nova Scotia. They make use of community infrastructure and facilities, and have the potential to attract important media coverage from outside the province, benefitting Nova Scotia's brand.

Communities, Culture and Heritage (CCH) is the provincial government department responsible for the development, attraction, and funding of events, as part of Nova Scotia's Culture Action Plan. Tourism Nova Scotia's role is to work with CCH and other partners to ensure events are leveraged to have maximum impact on the tourism industry.

## NICHE MARKETS

Niche markets or niche product/experience offerings are an opportunity to grow first-time visitation. For example, Nova Scotia is seeing annual growth in large and small port cruise visitation. As well, Nova Scotia is becoming a popular golf destination for golfers from around the world. Depending on the opportunity, Tourism Nova Scotia may work with an organization or business, through its industry partnership programs, to enhance niche experience offerings or support marketing efforts.



# PILLAR 2: INVEST IN MARKETS OF HIGHEST RETURN

Tourism Nova Scotia defines “market” as *who* Nova Scotia’s potential visitors are, and *where* those visitors are located. Tourism Nova Scotia relies on market research to ensure decisions and investments are informed by consumer expectations and rapidly evolving travel trends.

Research includes demographic, geographic, and psychographic market segmentation and targeting. Research is used to understand the travel objectives and interests of visitors, and help identify marketing and sector development initiatives that will have the most impact, and result in more high-value visitors coming to Nova Scotia. Visitors do not necessarily need to stay longer, but it is imperative that they spend more.

While research informs who, where, and how we target potential visitors, strengthening relationships with the travel trade, as well as partnerships with the Atlantic Canada Tourism Partnership (ACTP), Destination Canada, the Halifax International Airport Authority, airlines, and other transportation organizations will amplify reach and increase awareness of Nova Scotia.

## EXPLORER QUOTIENT® (EQ) AND NOVA SCOTIA'S TARGET TRAVELLERS

Tourism Nova Scotia has licensed Destination Canada’s traveller segmentation approach, Explorer Quotient® (EQ), to help identify and understand high-potential visitor prospects. The EQ segmentation approach considers more than traditional demographics (age, income, gender, family status, or education level); it delves deeper into psychographics to understand why people travel, why different types of travellers seek out different travel experiences, and how Nova Scotia can engage with visitors based on their travel values.

A thorough review of EQ has been conducted and Tourism Nova Scotia’s research team has matched Nova Scotia’s visitor population to their respective EQ segments. Following are the three priority EQ visitor segments for Nova Scotia:

### AUTHENTIC EXPERIENCERS

Authentic Experiencers are understated travellers looking for authentic, tangible engagement with the destinations they visit. They prefer to do their own thing at a destination, having control over what they see and when they see it. They do not rush around to take in all the “must-sees.” For this segment, travel is about personal development and learning. They are not looking to escape or “get away” from the stress of their everyday lives. Some Authentic Experiencers have a particular interest in understanding the history of the places they visit.

Authentic Experiencers will actively seek the most authentic cultural experiences possible, going so far as to learn the local language and to find the sights and experiences that are not considered “touristy.” They seek to connect meaningfully with the locals and will not shy away from living like the locals. They do not need to be pampered or have everything taken care of for them.

Authentic Experiencers will not seek out overly luxurious amenities or gourmet experiences. Although they are relatively affluent and do not shy away from making high-cost purchases, they do not derive pleasure from ostentatious consumption.

### CULTURAL EXPLORERS

Cultural Explorers are defined by their love of constant travel and continuous opportunities to embrace, discover, and immerse themselves in the culture, people and settings of the places they visit. Part of the joy of travel is learning about how life really is in a destination and connecting with the locals. To them, not feeling like a “tourist” is thrilling, and they do not want to feel rushed to visit the highlights of a destination. This segment truly values authentic local experiences that allow them to immerse themselves in the local culture. They have a desire for exploration, and enjoy trying new things. Cultural Explorers like to have fun and learn, and enjoy sharing their travel with like-minded companions.

Cultural Explorers appreciate the ability to escape; however, they do not need to be pampered or have every detail looked after for them. They prefer to do their own thing at a destination, and prefer a free and



spontaneous approach to seeing the sights. They prefer not to be constrained by “tourist” schedules or destinations.

This segment is not overly materialistic. Although price conscious, they will pay for a truly unique experience, but they want it to be worth it. They make efforts to be ethical consumers, and appreciate environmentally and socially responsible options.

### FREE SPIRITS

Free Spirits are highly social and open-minded. Their enthusiasm for life extends to their outlook on travel. Experimental and adventurous, they indulge in high-end experiences that are shared with others. They are the most social of the EQ segments, and are attracted to groups and shared experiences. Free Spirits want to see all the major attractions but do not need to go into depth with any of them. They may rush around to see the highlights of a location. This segment enjoys authentic local experiences that allow for cultural immersion. Part of the joy of travel is learning about how life really is in a destination and connecting with the locals there.

Free Spirits are highly motivated to succeed and like to show off their success. Status and brands are important.

Free Spirits have busy lives and feel time-stressed. Travel is an escape – a time to let loose, have fun and indulge themselves.

This segment often aspires to stay at the most luxurious accommodations and venues. Vacationing is a time to be more indulgent and carefree than at home. They are confident risk-takers, and are not afraid to take local transportation, stay in accommodations, and eat food that may not be the same as at home. They like to try new things for the novelty.

A deep understanding of these three segments will inform experience and product development for the overall tourism industry, as well as all aspects of marketing. For a more detailed description of EQ traveller segmentation, visit [tourismns.ca/research/explorer-quotient](https://tourismns.ca/research/explorer-quotient).



PILLAR 3:  
FOCUS ON WORLD-CLASS  
EXPERIENCES

New is necessary if Nova Scotia is going to increase tourism revenues to \$4 billion by 2024. New ideas, new investment, and new ways of doing business will differentiate Nova Scotia from destinations around the world and motivate visitors to travel to the province now versus putting the province on a “bucket list” for the future. Collaborating with the private sector to showcase and create experiences that align with the values and expectations of Nova Scotia’s target travellers will help position Nova Scotia as a world-class tourism destination.

When marketing Nova Scotia, it is important to lead with the province’s strengths to capture the attention of target market segments. These strengths include the accessible seacoast, marine wildlife, national parks, world heritage sites, and icons like the Cabot Trail, Lunenburg, Bay of Fundy, Bluenose II, and Peggy’s Cove. Leveraging natural assets and icons to create new, purchasable experiences elevates Nova Scotia’s strengths and inspires travel. World-class experiences aren’t necessarily luxury, rather they differentiate Nova

Scotia as a destination, such as experiences that are authentic to the culture, heritage, terroir and coastal landscapes, and those that generate buzz and build on the cachet of Nova Scotia as a vacation destination.

Tourism Nova Scotia will lead the development of world-class experiences in partnership with industry by leveraging EQ as a market segmentation tool, and aligning with partner promotional opportunities such as Destination Canada’s *Canadian Signature Experiences* program.

PILLAR 4: BUILD TOURISM  
CONFIDENCE

A population that feels confident and optimistic about Nova Scotia’s tourism industry will support the effort required to increase tourism revenues over a 10-year period to \$4 billion by 2024. Tourism Nova Scotia’s communications efforts will seek to ensure all industry stakeholders and Nova Scotians understand the importance of tourism to our province, and feel compelled to talk positively, with pride, about Nova Scotia’s tourism industry.



MARKETING

Tourism Nova Scotia’s consumer marketing strategy and tactics are targeted at first-time visitors from markets of highest return. A key challenge in attracting first-time visitors to Nova Scotia is generating awareness of Nova Scotia as a compelling vacation destination. Research shows that people may have an impression of Nova Scotia being a beautiful place, but they are not easily able to imagine what a vacation in the province might look like. Tourism Nova Scotia seeks to showcase known icons in its advertising campaigns, while also revealing unique experiences that may not be expected by the traveller — experiences so compelling that they motivate travel to happen quickly and not just land Nova Scotia on a “bucket list.”

CANADA

Canada continues to be Nova Scotia’s main source of travellers. Tourism Nova Scotia’s strategy in Canada is to market outside of Atlantic Canada, primarily to Ontario (Toronto) and Quebec (Montreal) to build brand awareness of Nova Scotia and grow visitation. Luring visitors from outside of Atlantic Canada who fit target EQ segments, using smart media tactics and a robust content marketing program, will be the strategy going forward within the Canadian market. Key marketing tactics include a

conventional and digital consumer marketing campaign featuring TV, out-of-home (OOH), search engine marketing (SEM), social ads, digital video, and digital display units combined with a robust content marketing campaign using travel media and influencers to build and push out content through primarily digital channels.

Within Canada, we have not reached the advertising saturation point, and because awareness of Nova Scotia is high, increased visitation is possible with more investment. Tourism Nova Scotia will look to increase investment in Canada to begin targeting regions outside of the current target markets.

ONTARIO

Outside of Atlantic Canada, Ontario is Nova Scotia’s largest market. Ontario visitors comprise one-quarter of Nova Scotia’s non-resident overnight visitor population.

Ontario

Arrivals by air 44%

Arrivals by road 56%

Average party spend\* \$1,200

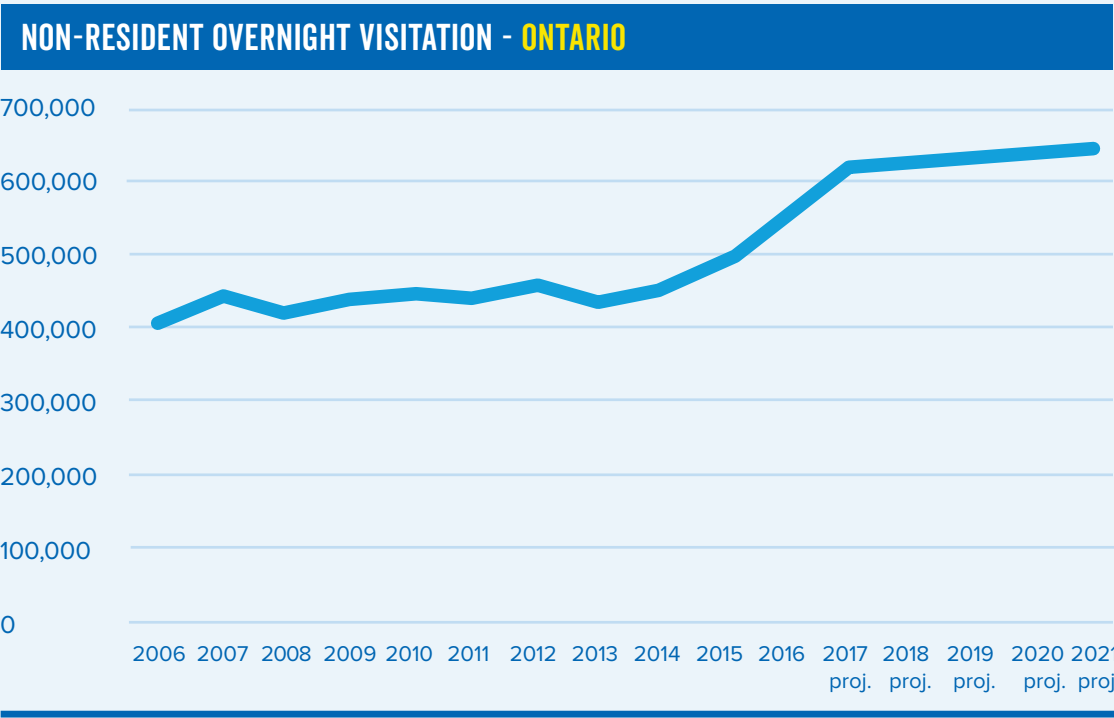
2016 visitation growth 12%

2012-2016 annual visitation growth 4.1%

2017 projected visitation growth 15%

Projected annual visitation growth 1.0%

\*excludes travel to / from Nova Scotia and major purchases





Growth in visitation from Ontario (+12%) in 2016 exceeded overall non-resident overnight visitation growth (+8%), and annual growth from Ontario over the past four years is 4.1%. Notably, this growth has come almost exclusively from road visitors (annual growth of 7.6%) with much lower growth in visitation by air (annual growth of 0.3%). Visitation from the Ontario market is expected to reach 641,000 by 2021.

QUEBEC

Quebec currently represents approximately 5% of overall non-resident overnight visitors. Growth in visitation from this market started to recover in 2014. Growth from the Quebec market in 2016 (+8%) was on par with overall

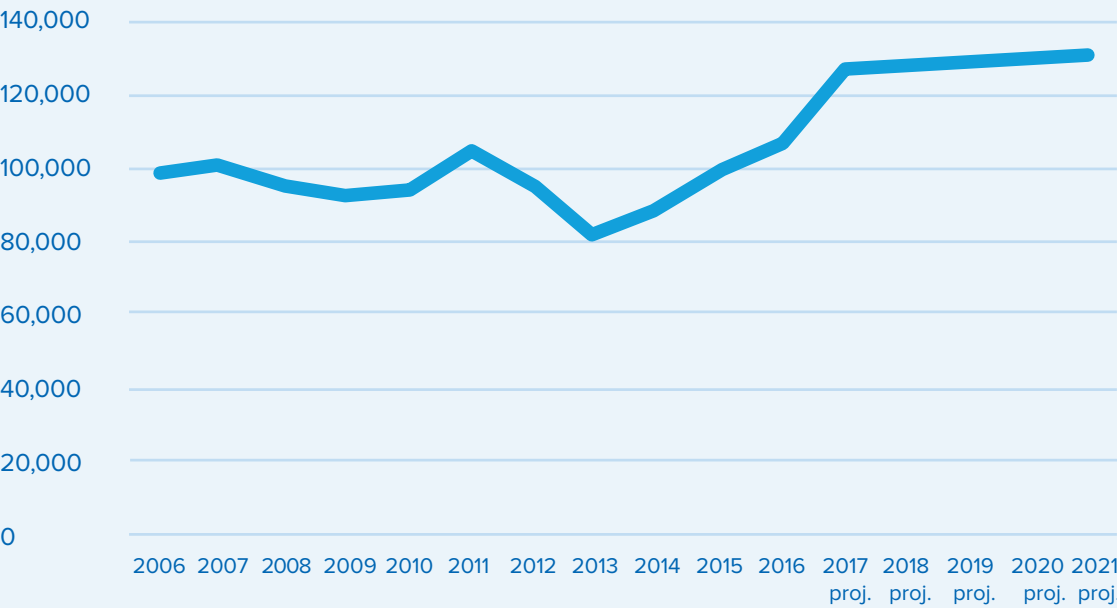
non-resident overnight visitation growth (+8%). Visitation from Quebec is expected to be moderate following two very strong years of growth, and reach 130,000 by 2021.

Quebec

- Arrivals by air 29%
- Arrivals by road 71%
- Average party spend\* \$1,000
- 2016 visitation growth 8%
- 2012-2016 annual visitation growth 3.1%
- 2017 projected visitation growth 17%
- Projected annual visitation growth 0.8%

\*excludes travel to / from Nova Scotia and major purchases

NON-RESIDENT OVERNIGHT VISITATION - QUEBEC



WESTERN CANADA

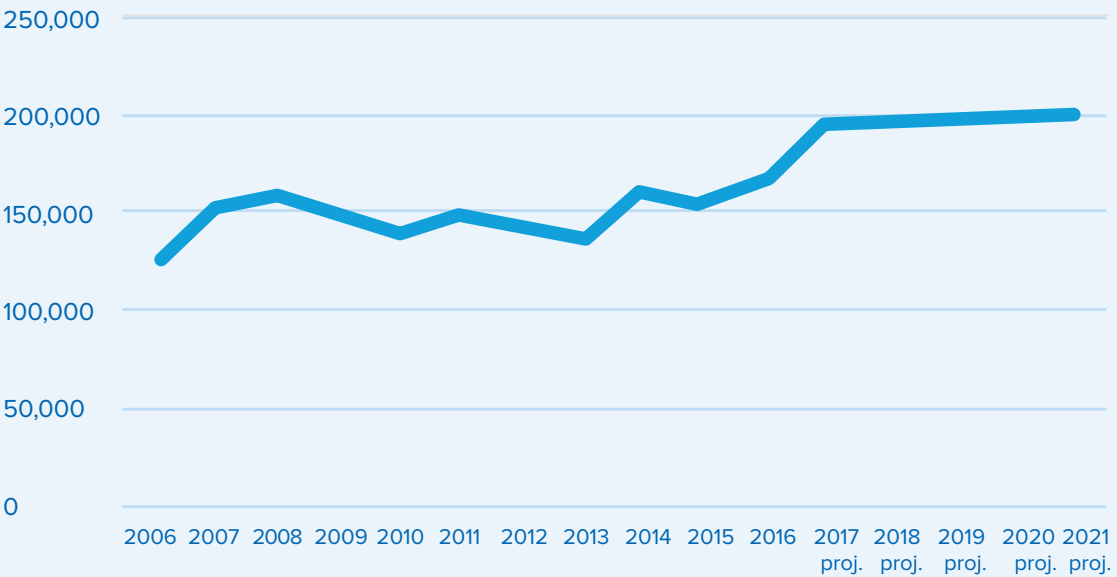
Western Canada currently represents approximately 8% of Nova Scotia’s non-resident overnight visitor population. Growth from Western Canada in 2016 (+9%) exceeded overall non-resident overnight visitation growth (+8%). Visitation from this market is expected to reach approximately 198,000 in 2021.

Western Canada

- Arrivals by air 82%
- Arrivals by road 18%
- Average party spend\* \$2,000
- 2016 visitation growth 9%
- 2012-2016 annual visitation growth 2.6%
- 2017 projected visitation growth 15%
- Projected annual visitation growth 0.7%

\*excludes travel to / from Nova Scotia and major purchases

NON-RESIDENT OVERNIGHT VISITATION - WESTERN CANADA





UNITED STATES

The US is Nova Scotia’s largest international market. Given the significant size of the American market, it is extremely difficult to garner enough advertising dollars to create a broad impact. Tourism Nova Scotia’s marketing strategy is to target the northeastern US, primarily the greater Boston area. The consumer campaign in the US is roughly a \$2 million investment and combines conventional and digital marketing tactics including TV, OOH, SEM, social ads, digital video, and digital display units, combined with a robust content marketing campaign using travel media and influencers to build and push out content using digital channels.

To extend reach, partnerships are critical. Tourism Nova Scotia partners with Destination Canada through its *Connecting America* program, Atlantic Canada Tourism Partnership (ACTP), and transportation partners such as Halifax International Airport Authority (HIAA), Bay Ferries, West Jet, and Air Canada to promote the destination.

Destination Canada’s *Connecting America* program includes content marketing using influencers and digital advertising. These channels are low cost and deliver high impact because each targets a specific message, to the right audience, at the right time. It is also a nice complement to Tourism Nova Scotia’s stand-alone brand campaign.

Efforts are amplified by the Atlantic Canada regional advertising that is done through ACTP, which also extends reach into New York. A partnership with HIAA helps promote flights from New York, and Tourism Nova Scotia continues to work closely with transportation partners such as Bay Ferries, Air Canada, and West Jet to create destination awareness.

The US currently represents approximately 10% of Nova Scotia’s non-resident overnight visitor population. Following several years of decline, growth in visitation from this market started to recover in 2014; however, visitation has not yet returned to 2006 levels. Growth from the US in 2016 (+14%) exceeded overall non-resident overnight visitation growth (+8%). Growth from the US is expected to continue and exceed historic 2006 levels of visitation by 2021 (258,000).

United States

Arrivals by air 48%

Arrivals by road 52%

Average party spend\* \$1,500

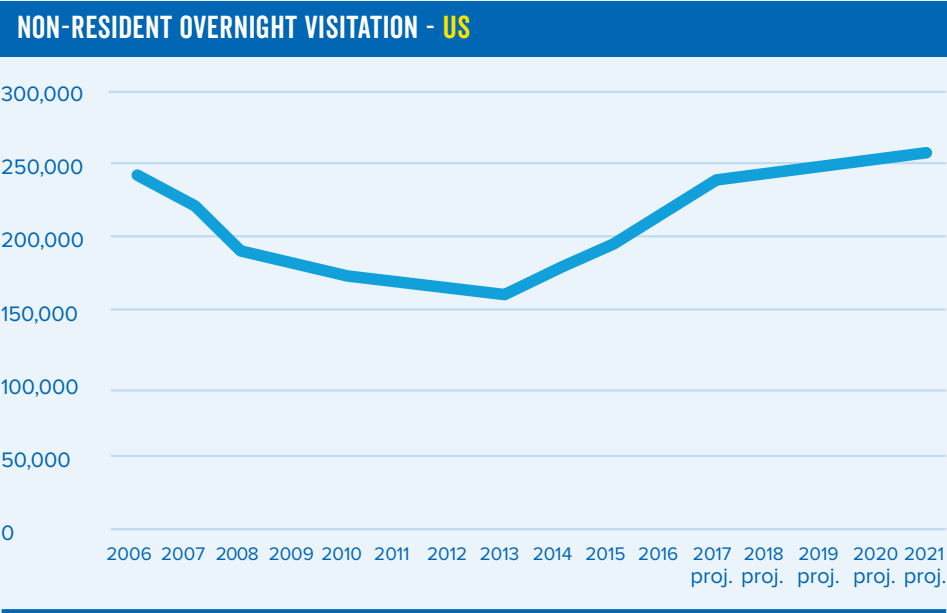
2016 visitation growth 14%

2012-2016 annual visitation growth 3.7%

2017 projected visitation growth 8%

Projected annual visitation growth 1.9%

\*excludes travel to / from Nova Scotia and major purchases



UNITED KINGDOM

Tourism Nova Scotia works with an in-market representative in the UK to build awareness of Nova Scotia and increase the sale of Nova Scotia products by the travel trade. Tourism Nova Scotia also partners with Destination Canada and the Halifax International Airport Authority to build awareness of the destination and maintain direct flights to Nova Scotia. Key marketing tactics include content marketing using influencers and digital advertising.

Tourism Nova Scotia will look to increase the level of marketing investment in this key international market to create more awareness of Nova Scotia as a choice destination. Leveraging partnerships further will allow for investment in both trade and digital channels that will expand Nova Scotia’s reach and awareness.

The UK is an under-developed market for Nova Scotia, and currently represents a small percentage of overall non-resident overnight visitation. Visitation to Nova Scotia from this market hovered around 20,000 for several years. The launch of a new flight from Glasgow to Halifax in 2015 contributed to significant growth in visitation to Nova Scotia that year. However, this growth did not continue in 2016, which saw a decline in visitation of 11% from the UK market. Visitation from this market is expected to be approximately 25,000 for the next five years.

United Kingdom

Average party spend\* \$2,100

2016 visitation growth -11%

2012-2016 annual visitation growth 9.4%

2017 projected growth -8%

\*excludes travel to / from Nova Scotia and major purchases





# GERMANY

As in the UK, Tourism Nova Scotia’s strategy in Germany is to work with in-market representatives who have strong relationships with trade partners to create and implement opportunities that build awareness of Nova Scotia and increase the sale of Nova Scotia holidays by tour operators. Tourism Nova Scotia also partners with Destination Canada and the Halifax International Airport Authority to build awareness of the destination and maintain direct flights to Nova Scotia. Key marketing tactics include content marketing using influencers and digital advertising.

To move the needle further in Germany, it is imperative that more investment be made to increase awareness and consideration of Nova Scotia. Partnerships with other Atlantic Canadian provinces and Destination Canada, for example, will increase investment in both trade and digital channels, expanding reach and awareness of Nova Scotia.

Germany represents a small percentage of overall non-resident overnight visitation to Nova Scotia. Visitation from this market typically ranges between 8,000 and 10,000 visitors. However, 2016 marked a year of strong growth from Germany, and visitation reached a high of approximately 13,000 visitors. Looking ahead to 2021, visitation from Germany is expected to maintain at between 10,000 and 12,000 visitors.

## Germany

Average party spend\* \$2,100

2016 visitation growth 43%

2012-2016 annual visitation growth 9%

2017 projected visitation growth 24%

*\*excludes travel to / from Nova Scotia and major purchases*

# CHINA

Tourism Nova Scotia’s marketing strategy in China includes participating in Destination Canada’s content marketing program to develop and distribute content and products across their established channels. Tourism Nova Scotia will also engage an in-market representative to work directly with trade partners across the country, including the Shandong and Guangdong provinces with which Nova Scotia has friendship agreements, to build awareness of Nova Scotia and increase the sale of Nova Scotia vacations by qualified tour operators. There is a significant opportunity for Nova Scotia to target the growing affluent, independent Chinese travel market. For perspective, in 2015, Canada welcomed 485,000 Chinese visitors, compared to approximately 75,000 in 2000. Gaining a foothold, however, will require a substantial investment and specialized market intelligence. Nova Scotia already has a competitive advantage with our province-wide accessible coastline and uncrowded, easy-to-explore communities. Nova Scotia has much to gain by developing more unique, purchasable experiences, focusing on the needs of Chinese visitors, and preparing our operators to be trade ready for this specialized market. Efforts are timely given 2018 is designated the Canada-China Year of Tourism.

TOURISM NOVA SCOTIA SEEKS TO  
SHOWCASE KNOWN ICONS IN ITS  
MARKETING CAMPAIGNS, WHILE ALSO  
REVEALING UNIQUE EXPERIENCES THAT  
MAY NOT BE EXPECTED BY THE TRAVELLER  
— EXPERIENCES SO COMPELLING THAT  
THEY MOTIVATE TRAVEL TO HAPPEN  
QUICKLY AND NOT JUST LAND NOVA  
SCOTIA ON A “BUCKET LIST.”



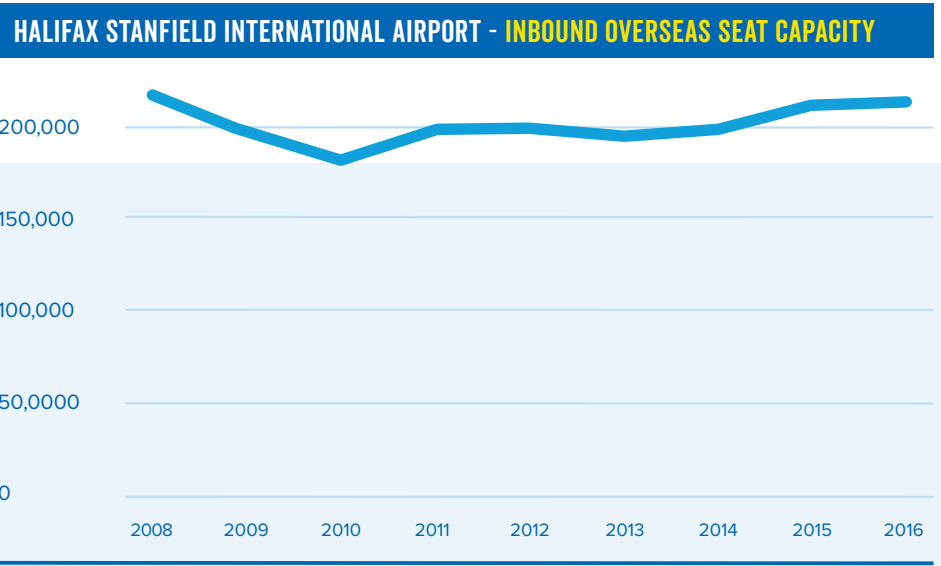
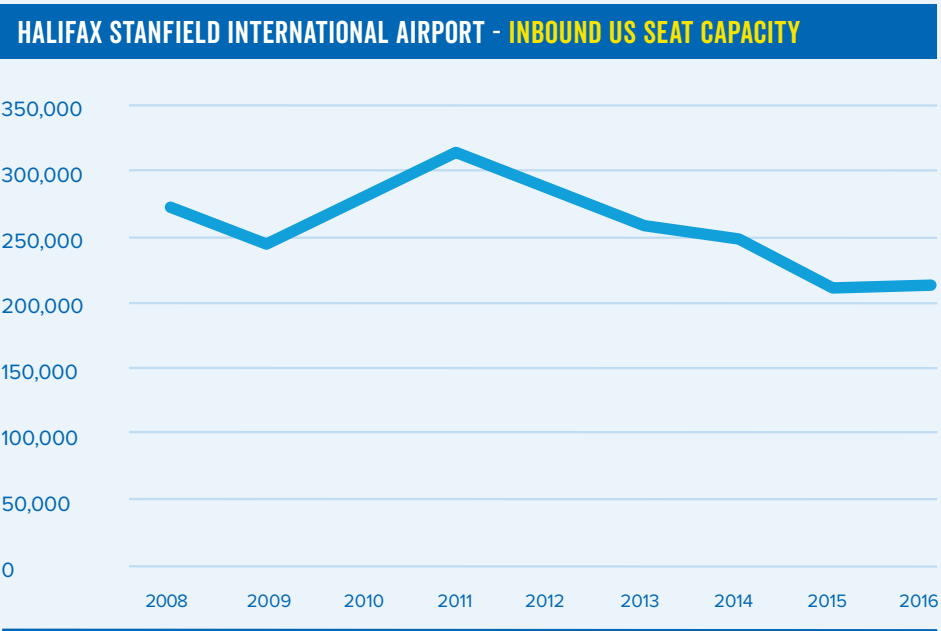
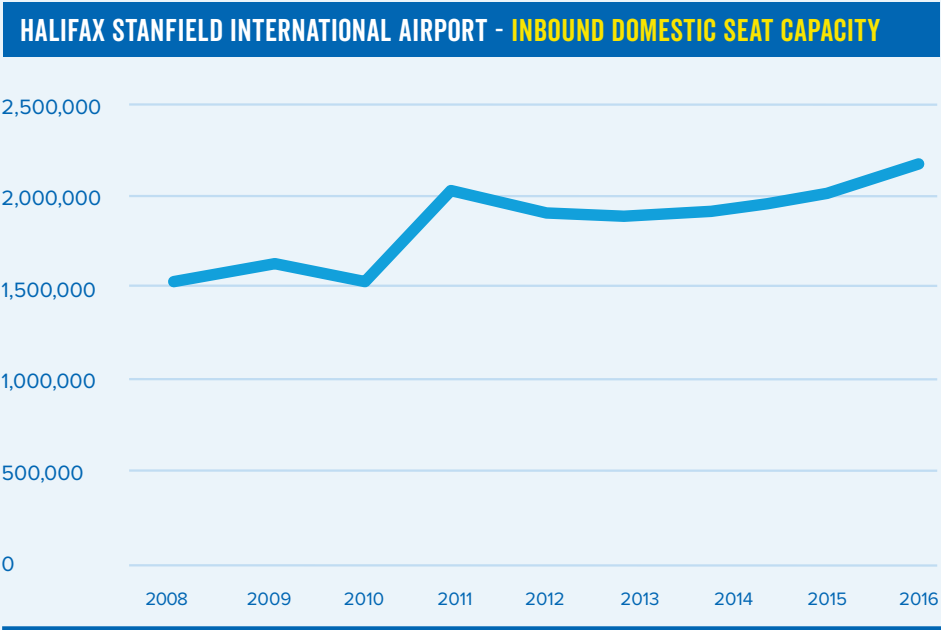


AIR ACCESS

Nova Scotia’s highest spending visitors are those who arrive by air. While there has been an increase in inbound capacity from within Canada over the past eight years, inbound capacity from US markets has declined, and there has been only a slight increase in inbound air capacity from overseas markets. Air access is critical to provide high-value international visitors with ease of

access. If it is not easy to get to the province, travellers may choose an alternative vacation destination.

Tourism Nova Scotia will continue to work closely with the Halifax International Airport Authority to secure and promote air routes, and build visitation and spending from key international markets.





# APPROACH

The cost of entry into destination marketing has decreased substantially in recent years with the advent of social media and widespread availability of user-generated content. Peer-generated stories, videos, photography, and reviews are increasingly important to travellers, and Tourism Nova Scotia amplifies and repurposes wherever possible. As advertising moves more and more into the digital realm, the challenge is finding new and relevant content that will inspire target travellers to book their vacation immediately. Consumer testimonials are a trusted source for future visitors.

Tourism Nova Scotia is focused on achieving efficiencies in media buying, leveraging partnerships to maximize share-of-voice in target marketplaces, and shifting dollars to channels that demonstrate the best return on investment. For example, moving more budget into digital versus print advertising allows for direct targeting of EQ segments, as well as better measurement and evaluation.

## CONSUMER ADVERTISING CAMPAIGN

Tourism Nova Scotia launches a direct-to-consumer advertising campaign annually to capture the attention of prospective visitors who are making their vacation plans. Campaign tactics vary depending on budget, objectives, and past campaign performance. To maximize reach and frequency, Tourism Nova Scotia evaluates channels each year to achieve the best media mix. The 2017 campaign focused on the following channels:

- Television;
- Digital banner ads and videos;
- Special digital features with major media outlets in key markets (i.e., homepage takeovers, Toronto Star); and
- Impactful out-of-home billboards in high-traffic locations (i.e., billboards, elevators).

Tourism Nova Scotia will continue to leverage evolving consumer, media, and technology trends and opportunities to inform direct-to-consumer campaigns.

# TRAVEL TRADE

Tour operators and travel agents are an important sales channel, particularly in international markets, and it is expected they will continue to play a significant role over the next five years. They provide added value to customers who are less familiar with Nova Scotia and its product offerings, and for those who prefer to book travel with the assistance of a travel expert. Tour operators and travel agents source a range of holiday itineraries, and they can provide services and experiences that may not otherwise be available directly to consumers. The travel trade not only provides a sales opportunity for Nova Scotia’s tourism industry, it also offers access to customers and markets that Nova Scotia tourism operators could not easily reach on their own.

Tourism Nova Scotia will continue to undertake travel trade initiatives to promote a greater understanding of the province, and to facilitate sales opportunities for trade-ready products and experiences. These initiatives include:

- Participating in key travel trade marketplaces in all target markets to build important sales relationships and identify new opportunities;
- Implementing partnership marketing activities with key accounts to increase the promotion and sale of Nova Scotia holidays; and
- Hosting qualified travel trade clients on familiarization tours. These tours offer a great opportunity for travel buyers to experience Nova Scotia first-hand and to become new sales ambassadors for the province. Industry support for these tours is an important marketing investment for operators to showcase their products and experiences in a cost-effective way.

Destination Canada also leads several travel trade initiatives to help develop key travel trade accounts that are committed to selling more Canada product. Leveraging Destination Canada’s activity and in-market relationships will continue to be important as Tourism Nova Scotia evolves its international marketing efforts. A key tactic in promoting the province to international tour operators will be hosting *Rendez-vous Canada* (RVC) in Halifax in 2018. RVC is Destination Canada’s signature travel trade event, and features a business-to-business marketplace. Approximately 1,800 tour operators and industry professionals will experience Nova Scotia during the tradeshow, networking events, and familiarization tours.

Recognizing that visitors from further away markets will often combine a visit to Nova Scotia with one of the other Atlantic Provinces, Tourism Nova Scotia participates in the Atlantic Canada Tourism Partnership on several travel trade sales activities, including tour operator marketing partnerships, trade shows, and destination training (see Appendix).

Building strong relationships with tour operators requires a long-term approach and an understanding of their business requirements. A new trade-readiness initiative, developed in 2017 with fellow Atlantic Canada tourism partners, will support a greater understanding of the requirements of working with the travel trade. This new program will be the foundation of a focused effort to introduce more Nova Scotia experiences into the international sales distribution channel.

## TRAVEL MEDIA

Travel media is an important channel through which to reach an audience of potential visitors to Nova Scotia. Media from print, TV, digital, and other influencers offer valuable third-party endorsement and content in the promotion of Nova Scotia.

Tourism Nova Scotia’s media relations specialists identify and assess opportunities to increase exposure for Nova

Scotia by sharing inspiring story ideas that align with target EQ segments. An in-depth understanding of Nova Scotia’s regions, experiences, and operators is required to pitch the story angles that will appeal to a journalist’s or influencer’s audience. Working collaboratively with industry operators to host these media influencers on familiarization tours of Nova Scotia is essential. A strong partnership delivers the best experience for media, and allows for leveraging resources to host more qualified media.

Tourism Nova Scotia will continue to undertake initiatives to increase media coverage. Examples include:

- Participating in key media marketplaces to build relationships with key media contacts, providing new story ideas and information;
- Hosting media on familiarization tours, creating and organizing a customized itinerary to match the journalist’s needs;
- Providing destination knowledge and product information for media enquiries;
- Sharing destination news and highlights with a variety of media contacts through media sales calls, events, e-newsletters, and press releases; and
- Partnering with the Atlantic Canada Tourism Partnership and Destination Canada to extend media reach through in-market events, marketplaces, and press releases.

A key opportunity to promote Nova Scotia to international media is *GoMedia Canada*. This annual signature business-to-business event moves from province to province and brings together more than 125 national and international travel media to meet with marketing and communications professionals from various Canadian tourism organizations. The VIP attendees are introduced to wonderful Nova Scotia story ideas during marketplace appointments, networking events, and familiarization tours. Tourism Nova Scotia is hosting *GoMedia* in Halifax in 2017.



IN-MARKET REPRESENTATIVES

Tourism Nova Scotia’s work in priority overseas markets is supported with contracted market development specialists that have an established network of travel trade, travel media, and other influential contacts. In-market representatives provide market expertise, and they identify and implement initiatives that will maintain and increase Nova Scotia’s profile, and ultimately drive visitation from overseas markets. Currently, the organization has representation in the UK and Germany, and will be expanding into China.

PARTNERSHIPS

Partnerships and leveraging all available resources are critical to achieving tourism growth. Through a mix of traditional, non-traditional, and industry partnerships, Tourism Nova Scotia will:

- Develop compelling content;
- Increase direct-to-consumer media investment;
- Create more awareness of the destination;
- Reach target EQ segments; and
- Share learnings to increase knowledge and ability to deliver against target segments.



GOOGLE

Tourism Nova Scotia and Google have been partners since 2014. The goal of the partnership is to build innovative and engaging digital content which is amplified to the right person, with the right message, at the right time. Data and analytics garnered from these digital activities drive insights and optimize campaign tactics.

DESTINATION CANADA

Tourism Nova Scotia works with Destination Canada, the national tourism marketing organization, to extend its reach into markets where Canada has an established presence and where Nova Scotia can benefit. With limited marketing dollars, Tourism Nova Scotia leverages established relationships and channels built by Destination Canada to gain a share-of-voice and build awareness of the province. Some tactical examples of the partnership with Destination Canada include:

*Connecting America:* Launched in April 2016, this program was created to drive 680,000 additional pleasure travellers to Canada from the US, and generate \$400 million in incremental visitor spending. It targets urban, active, first-time visitors aged 25-44. Tourism Nova

Scotia participates in this program as an independent brand and through the Atlantic Canada Tourism Partnership. In 2016, Tourism Nova Scotia targeted the cities of Boston, New York, and Philadelphia. Another element of the *Connecting America* program is a co-op opportunity which allows Tourism Nova Scotia to leverage partner funds from Destination Canada to create a robust social influencer program that helps advance the provincial tourism brand in specialized channels.

*Millennial:* Millennials are the fastest growing demographic travel segment and one of the most influential groups of travellers worldwide. For that reason, Destination Canada teamed up with provincial, destination, and national travel partners in 2017 to inspire Canadian millennials to travel within Canada leading up to, during, and beyond Canada’s 150th birthday. Working with Bell Media, the goal was to reach 4.4 million Canadian millennials throughout the duration of the campaign, and encourage an additional 150,000 trips by the end of 2017. This program involved significant media partners pushing content out for an entire year, featuring a different area of Canada each time.





ATLANTIC CANADA TOURISM  
PARTNERSHIP (ACTP)

ACTP is a long-running, ongoing, joint marketing initiative of the Government of Canada, the four Atlantic Canada provincial tourism marketing organizations and tourism industry organizations, and industry operators. The purpose of the agreement is to grow tourism in Atlantic Canada from targeted areas of the US and UK.

Nova Scotia has a history of working collaboratively with Atlantic Canada and federal government partners. Starting in 2017, Tourism Nova Scotia will participate in the *Atlantic Canada Growth Strategy for Tourism* to support the growth of a more vibrant and sustainable tourism economy for Nova Scotia. This strategy, led by the federal government with involvement from all four Atlantic Canada provinces, is focused on three key areas:

- International marketing and market development;
- Tourism product innovation; and
- Investigative market research and improved measurement metrics.

NOVA SCOTIA TOURISM INDUSTRY  
BUSINESSES AND ORGANIZATIONS

Following an in-depth review of past tourism partnership programs, Tourism Nova Scotia initiated a new partnership model in 2015, built on the foundation of collaboration, co-investment, and accountability. Two marketing-oriented partner platforms were created with a view toward: 1) expanding Nova Scotia’s library of consistent, brand-aligned, visual assets for both Tourism Nova Scotia and its partners; and 2) leveraging the collective group buying power of the tourism industry for targeted digital marketing. At one time, the provincial tourism organization issued grants to organizations for advertising and content development activities. Under the new model, Tourism Nova Scotia engages as an equal investor with industry to develop marketing assets and digital advertising programs that are mutually beneficial, and that allow Tourism Nova Scotia and its partners to market more broadly.

SECTOR  
DEVELOPMENT

Tourism Nova Scotia’s sector development efforts are focused on increasing Nova Scotia’s competitiveness as a tourism destination. Nova Scotia’s tourism industry must continue to work to enhance the quality and availability of experiences, services, and accommodations to meet the expectations of priority target market segments.

There is an opportunity to further develop Nova Scotia’s tourism icons and leverage the province’s competitive strengths to create new icons. There is also an opportunity to identify and share investment opportunities with industry to support this development.

To realize the doubling of tourism revenues, it is necessary to understand target visitors and lure them to Nova Scotia with “wow” experiences, while ensuring sustainable businesses are ready to deliver world-class products, services, and lasting memories. Tourism Nova Scotia’s sector development team will continue to work with businesses, associations, and government partners to enhance the competitiveness and readiness of Nova Scotia’s tourism sector. The team is responsible for conducting research to identify growth opportunities and proactively facilitate development.

RESEARCH

Tourism Nova Scotia will optimize the best research sources to measure tourism activity, adopt new, leading edge tourism indicators, and initiate primary research to gather new market insights to inform marketing and development decisions.

Tourism Nova Scotia is a leader in provincial tourism research. Sharing information enables industry, shareholders, and partners to base decisions on the best available evidence.

Key research initiatives include:

- Collecting various tourism performance indicators, including visitation estimates, accommodations estimates, and tourism revenue estimates.

- Investigating and adopting additional (new) tourism indicators to measure visitor expenditures, visitation, and tourism activity.
- Leveraging Destination Canada’s EQ segmentation, a travel-values based segmentation model, to provide insights to support informed decision-making by Tourism Nova Scotia, industry, and government. Going beyond geography and demographics, the research team can dive deeper into understanding what motivates visitors by aligning with their travel values. Tourism Nova Scotia has adopted the EQ model and identified key EQ segments for Nova Scotia. Tourism Nova Scotia will continue to provide expertise and share EQ profile information with industry and other stakeholders.
- Implementing primary research initiatives including the “Nova Scotia Tourism Brand Health Monitor” and the “Nova Scotia Visitor Exit Survey” (VES). Brand Health tracks key performance indicators (i.e., call to action, brand connection) in key markets.
- Increasing frequency of the VES to provide more timely results of tourism activity. The VES is the most comprehensive survey of visitors to the province. The VES will be conducted every two years, rotating from full year data collection to peak period data collection (June to October).
- Conducting timely, relevant online surveys through the Nova Scotia Tourism Online Advisory Panel, a pool of visitors and possible visitors that have agreed to provide feedback to Tourism Nova Scotia.
- Developing and administering evaluation frameworks to ensure effective and accountable programming within Tourism Nova Scotia.
- Investigating and adopting new technologies to optimize operational effectiveness and continuous improvement of collecting and disseminating tourism statistics and visitor information.





TOURISM NOVA SCOTIA WILL CONTINUE TO PROVIDE ADVICE AND GUIDANCE TO INDIVIDUALS INTERESTED IN STARTING A TOURISM BUSINESS OR OFFERING A TOURISM EXPERIENCE. HELPING THE INDUSTRY PREPARE FOR FUTURE INVESTMENT WILL BE ANOTHER KEY AREA OF FOCUS.



- As a respected leader in tourism research, Tourism Nova Scotia participates on various regional and national research committees (Destination Canada, Tourism Research Partners, Atlantic Canada Tourism Research Group). Tourism Nova Scotia will continue to actively partner on select joint research initiatives that will benefit the province.
- Sharing tourism research and monthly tourism statistics via Tourism Nova Scotia's website, InTouch, enquiries, and presentations.

## EXPERIENCE DEVELOPMENT

Tourism Nova Scotia proactively identifies opportunities for new experience and product development, and works with industry partners to turn concepts into reality through the *World-class Experience EXCELLerator* program. The program tests experience concepts through the lens of the Free Spirit market segment to identify experiences that will resonate with this EQ segment. Tourism businesses and organizations are invited to partner in the development of the concepts that score the highest in appeal and ability to motivate visitation to the province. Through a three-year agreement, Tourism Nova Scotia staff share expertise in EQ training, market-readiness assessment, experience coaching,

- and maximizing marketing/sales/travel media. Partners also benefit from the development of photography and/or video assets under the creative direction of Tourism Nova Scotia's marketing agency to ensure the experiences can be featured in both the partner's and Tourism Nova Scotia's marketing and sales channels. 2017-2022 experience development initiatives will include:
- Continuing the development of new, world-class experiences, primarily in partnership with the private sector with a strong emphasis on using market research (EQ, primary research) and insights to initiate and influence development.
  - Coaching operators, partners, and destinations on the development and enhancement of world-class experiences that appeal to target segments.
  - Elevating export-ready experiences to the Canadian Signature Experiences collection to increase Nova Scotia's presence in Destination Canada's global markets.
  - Identifying and prioritizing Nova Scotia's most competitive existing and emerging products and tourism icons that match the interests and values of targeted EQ market segments and high-yield niche markets. Examples of strategic initiatives include: Good Cheer Trail; Seafood Trail; cycling trails (Blue Route); and destination trails. New products and enhanced icons can provide a platform for private sector to create and sell experiences, strengthen target market appeal, and increase revenues.
  - Identifying opportunities for the development and growth of high-quality, competitive tourism products that will motivate travel to the province. Building upon the critical success factors of demand generators, Tourism Nova Scotia will investigate and identify opportunities for Nova Scotia's "next big idea." This might be a new attraction, event, or accommodation, or the evolution of an existing asset to the next level.
  - Partnering with industry to pilot new experience development programs. Using the *EXCELLerator* model, Tourism Nova Scotia will test the delivery of a focused program stream on Indigenous tourism

experience development. Tourism Nova Scotia will partner with the Indigenous Tourism Association of Canada (Nova Scotia/Atlantic Region) on the development and delivery of this stream. Going into 2018 and beyond, the issue of seasonality will be addressed through the *EXCELLerator* program. Based on target market appeal, participants will be encouraged to create compelling experiences available in both the winter and shoulder seasons.

## BUSINESS DEVELOPMENT

Tourism Nova Scotia will continue to provide advice and guidance to individuals and organizations interested in starting a tourism business or offering a tourism experience. Helping the industry prepare for future investment will be another key area of focus.

Business development initiatives include:

- Conducting a jurisdictional review of current business development/investment resources and best practices.
- Providing business advisory services to new and existing businesses through in-house expertise, or directing businesses to partner agencies for specialized advice.
- Providing resources to assist tourism operators in opening and running a business.
- Tracking tourism investment enquiries and contributing to the provincial investment opportunity repository.
- Conducting an accommodation needs assessment that will provide stakeholders with information they can use to help make decisions on potential investments in accommodations.
- Working with economic development partners that have identified tourism as a key sector in their region to provide support on succession planning and investment attraction.



# CORPORATE COMMUNICATIONS

## ENGAGEMENT, COMMUNICATIONS, AND CONFIDENCE-BUILDING

Stakeholder engagement, communications, and confidence-building are key to achieving the \$4 billion goal.

Nova Scotia’s tourism industry has experienced significant changes in recent years, therefore, strong leadership from Tourism Nova Scotia is key to achieving role clarity, reducing duplication, and fostering stakeholder alignment with this strategy.

Tourism Nova Scotia will engage industry, government, and community tourism stakeholders to encourage

business, infrastructure, and community investments that will help motivate travel to the province and provide spending opportunities for visitors. Tourism Nova Scotia will share stories of innovation and competitiveness happening throughout the industry to instill pride and confidence among Nova Scotians, and provide regular updates on the industry’s collective progress against the \$4 billion goal.

Tourism Nova Scotia’s corporate website, [tourismns.ca](http://tourismns.ca), will continue to be the go-to source for Tourism Nova Scotia news, research, advertising opportunities, industry partnership programs, and tourism performance results.

Through a variety of channels, including workshops, presentations, Tourism Nova Scotia’s industry newsletter (InTouch), social and traditional media, and partner initiatives, Tourism Nova Scotia will inform, engage, and inspire Nova Scotians to be proud of who we are as a tourism destination.



# BENEFITS TO STAKEHOLDERS



Tourism Nova Scotia offers many opportunities for tourism businesses, organizations, and stakeholders to deepen their understanding of visitors, develop experiences that will motivate travel to the province, and promote their offerings. Tourism Nova Scotia’s partnership programs empower the tourism industry to co-invest in initiatives that leverage dollars, utilize expertise, and increase marketing reach.

Tourism Nova Scotia’s trip planning website, [NovaScotia.com](http://NovaScotia.com), and social media channels offer tourism businesses an opportunity to promote their

products and services to millions of potential customers. Tourism Nova Scotia amplifies these channels to gain exposure in international markets through partnerships with organizations such as Destination Canada, Halifax Stanfield International Airport Authority, and the Atlantic Canada Tourism Partnership.

Tourism Nova Scotia’s research expertise and coaching services, paired with collaborative industry partnership programs, provide operators with opportunities to implement new revenue-generating ideas and grow their businesses.



# MEASURING PERFORMANCE



Tourism Nova Scotia has developed performance measures to assess each pillar of its strategic plan. The measures reflect both corporate and industry goals. Key performance measures include:

- Industry progress toward the \$4 billion tourism revenue goal.
- Stakeholder and resident engagement with, and commitment to, the tourism strategy.

- Assessment of the annual marketing campaign.
- Assessment of Nova Scotia's tourism brand health in key markets.
- Program evaluation frameworks.

These measures are preliminary, and will be further developed with input from the Government of Nova Scotia.

# APPENDIX

## NOW OR NEVER REPORT

<https://onens.ca/img/now-or-never.pdf>

## TOURISM INDUSTRY ASSOCIATION OF NOVA SCOTIA (TIANS)

[www.tians.org](http://www.tians.org)

## NOVA SCOTIA TOURISM HUMAN RESOURCE COUNCIL (NSTHRC)

[www.tourismhrc.com](http://www.tourismhrc.com)

## INDUSTRY PARTNERS

The Nova Scotia tourism industry is made up of a diverse group of private businesses and public organizations, including the Tourism Industry Association of Nova Scotia, regional tourism industry associations and destination marketing organizations, community groups, specialized organizations with tourism interests, and municipalities.

By forging strategic partnerships and leveraging our investments, we are building a strong industry that will allow us to become more competitive and innovative in our key markets and expand our reach.

## NATIONAL, ATLANTIC AND FEDERAL PARTNERS

- Atlantic Canada Opportunities Agency
- Atlantic Canada Tourism Partnership
- Destination Canada
- Cruise Atlantic Canada
- Halifax Stanfield International Airport / Halifax International Airport Authority
- J. A. Douglas McCurdy Sydney Airport
- Parks Canada
- Halifax Port Authority
- Port of Sydney
- Tourism Industry Association of Canada
- Tourism Human Resource Council of Canada

## NOVA SCOTIA PROVINCIAL AND MUNICIPAL GOVERNMENT

- Events East
- Department of Agriculture
- Department of Business
- Department of Communities, Culture and Heritage
- Department of Environment
- Department of Fisheries and Aquaculture
- Department of Labour and Advanced Education
- Department of Municipal Affairs: Regional Enterprise Networks



- Department of Natural Resources
- Department of Transportation and Infrastructure  
Renewal
- Nova Scotia Immigration
- Union of Nova Scotia Municipalities
- Waterfront Development

**INDUSTRY ASSOCIATIONS & CHAMBERS OF COMMERCE**

- Annapolis Valley Chamber of Commerce
- Destination Cape Breton Association
- Destination Eastern and Northumberland Shores  
Association
- Digby and Area Tourism Association
- Discover Halifax
- South Shore Tourism Group
- Tourism Industry Association of Nova Scotia
- Truro and Colchester Chamber of Commerce
- Yarmouth and Acadian Shores Tourism Association

**TOURISM SECTOR ASSOCIATIONS/  
ORGANIZATIONS**

- The Nova Scotia Bed and Breakfast Association
- Campground Owners Association of Nova Scotia
- Craft Brewers Association of Nova Scotia
- Hotel Association of Nova Scotia
- Innkeepers Guild of Nova Scotia
- Inns of Nova Scotia
- Nova Scotia Tourism Human Resource Council
- Restaurant Association of Nova Scotia
- Taste of Nova Scotia
- Wines of Nova Scotia





