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Tourism Nova Scotia is the provincial Crown corporation responsible for marketing Nova Scotia as a tourism destination, improving tourism competitiveness, and leading the growth of Nova Scotia’s tourism industry. In alignment with the provincial government’s inclusive economic growth priority and our corporate strategy, Driving Export Revenue, we work with businesses, community organizations, and all levels of government to grow Nova Scotia’s tourism economy.

After four consecutive years of growth, including a 28% increase in visitation between 2013 and 2017, visitation in 2018 has moderated and revenue growth is anticipated to be modest. These performance indicators underscore the importance of attracting higher-spending visitors to the province and moving beyond the status quo to achieve the Ivany Report goal of $4 billion in tourism revenues by 2024. It will take strategic and coordinated action by Tourism Nova Scotia, government departments, Crown corporations, communities, and tourism businesses to address important “strategic game changer” growth opportunities including: improving the quality and supply of accommodations throughout the province; extending the tourism season; addressing labour challenges; growing visitation from China; and increasing air capacity.

In 2019-20, Tourism Nova Scotia will work with stakeholders to advance the "strategic game changers" mentioned above, and stay focused on marketing and business development activities, industry programs, and outreach that will drive tourism growth.

Our 2019-20 advertising campaign will inspire travellers with the many exciting things they can do while on vacation in Nova Scotia. Our Digital Content Marketing program will give industry partners an opportunity to co-invest in the development of video/photo assets, digital advertising, or both, depending on the mutual needs of the applicant and Tourism Nova Scotia.

Our sector development team will implement new initiatives for tourism operators to increase their expertise in working with the travel trade in international markets and offering quality services to international visitors. We will work with tourism operators and businesses to create experiences that motivate travel to Nova Scotia, with a specific focus on Indigenous, African Nova Scotian, and off-peak seasonal experiences. We will also administer the Tourism Revitalization of Icons program (TRIP) to enhance five iconic tourism sites throughout the province.

Through partnerships with Nova Scotia’s tourism industry, Destination Canada, the Atlantic Canada Opportunities Agency, other government departments, and the Atlantic Canadian provinces, we will continue our efforts to increase visitation and tourism spending, strengthen Nova Scotia’s tourism brand in our target markets, and build tourism confidence.

Evidence-based research will continue to underpin everything we do. In 2019-20, we will conduct a full-year Visitor Exit Survey, to update the profiles of visitors to the province. With travel trends and best practices guiding our actions, we will embody our corporate vision to be recognized globally as the leading destination marketing organization.

Sincerely,

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

Michele Saran, CEO, Tourism Nova Scotia
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; and
• Communicate and collaborate with communities, private industry, and the tourism industry in the province.

Tourism Nova Scotia’s Ministerial Mandate is to expand key tourism sites in Nova Scotia.

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.

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 Business.
Tourism Nova Scotia was established as a private sector-led Crown corporation to achieve tourism growth in the province and lead the industry towards the goal of growing annual tourism revenues to $4 billion by 2024. As the destination marketing organization for Nova Scotia, Tourism Nova Scotia is responsible for developing a tourism strategy and leading tourism marketing and development efforts for the province.

Tourism Nova Scotia’s five-year strategic plan, Driving Export Revenue, was first released in 2017 and is updated annually. The strategic plan aligns with the key provincial government priority of inclusive economic growth, with a specific focus on strategic sector growth. The tourism industry, with its potential to drive export growth, has been identified as an area of focus. The provincial government’s economic growth priorities inform Tourism Nova Scotia’s strategic plan and underpin the corporation’s 2019-20 business plan.

**Strategic Pillars**

Tourism Nova Scotia’s strategic plan identifies four key pillars which guide its activities:

1. **Attract first-time visitors to Nova Scotia**
   While all visitors are important, Tourism Nova Scotia's advertising messages and execution focus on those who haven’t been to the province before; specifically, the first-time pleasure visitor. First-time pleasure visitors spend more in Nova Scotia and are the most likely to be influenced by Tourism Nova Scotia’s marketing activities.

2. **Invest in markets of highest return**
   Tourism Nova Scotia invests its marketing dollars in markets that will attract the highest-value visitors to Nova Scotia.

3. **Focus on world-class experiences**
   Tourism Nova Scotia leads tourism experience development and sector development through a “world-class” lens to support attracting first-time visitors to the province. Tourism Nova Scotia partners with the private sector to showcase and create experiences that align with the travel values and expectations of Nova Scotia’s target travellers, and leverage the province’s existing assets and icons to create new, purchasable experiences.

4. **Build Nova Scotia’s tourism confidence**
   Tourism Nova Scotia will build stakeholder knowledge of, and support for, its strategic direction to attract increased investment, grow revenues, and boost Nova Scotia’s tourism confidence.
Innovation, Collaboration, and Stakeholder Alignment
Achieving Nova Scotia's aggressive tourism revenues goal requires all stakeholders to align with the goal and own their roles.

Industry (Tourism Operators and Businesses)
Industry roles include:
- Investing in product to provide the types of purchasable, world-class experiences that travellers want;
- Closing the sale pre-trip and during-trip; and
- Exceeding visitor expectations to drive repeat visitation and lead visitors to recommend Nova Scotia to others.

Community
Community is defined as municipalities, regional/community destination marketing organizations, and regional tourism industry associations. Community also includes all Nova Scotia residents. Community roles include:
- Partnering with industry on destination development and marketing;
- Engaging in positive interactions with visitors that influence them to return and recommend Nova Scotia as a vacation destination;
- Helping residents understand the value of tourism; and
- Providing visitor servicing.

Government (Federal and Provincial)
Government enables tourism growth by considering policies and investments in programs and infrastructure that will improve the operating environment for tourism businesses and increase Nova Scotia’s competitiveness as a tourism destination. Government roles include:
- Community economic development;
- Attraction of inward investment; and
- Infrastructure development.

Other Key Stakeholders
The Tourism Industry Association of Nova Scotia (TIANS) acts as the “voice of tourism” to lead the advancement of the tourism industry.

The Nova Scotia Tourism Human Resource Council promotes and supports the development of a skilled and professional workforce for Nova Scotia’s tourism industry.
Strategic Game Changers
Following four years of strong visitation growth, visitation to Nova Scotia moderated in 2018. To reach the $4 billion revenue goal, more must be done. Tourism Nova Scotia has identified five “strategic game changer” growth opportunities that must be embraced and addressed by all tourism industry stakeholders to create the conditions for continued growth in visitation and associated tourism spending. More information on the strategic game changers can be found in Driving Export Revenue.

1. Accommodations
There is a significant opportunity with respect to both the quantity and quality of accommodations. Accommodations that meet and exceed visitor expectations will increase Nova Scotia’s capacity to attract high-value visitors who will spend more in the province.

2. Seasonality
Nova Scotia is typically not viewed by travellers as a year-round destination, and has limited experience and product offerings outside the peak months. Developing year-round operations is a key opportunity to diversify and grow Nova Scotia experiences, and increase revenues by extending the tourism season.

3. Labour
Many operators experience difficulties attracting and retaining employees, due to both a general shortage of labour across the province and the current seasonal nature of tourism. Addressing this shortage of qualified labour will support the growth of tourism businesses.

4. China
Nova Scotia is well positioned to be the “next hotspot” for Chinese visitors coming to Canada. Businesses that improve their market readiness will be better equipped to attract and accommodate more visitors from China, and provide memorable experiences that will lead to recommendations and repeat visitation.

5. Air Capacity
Nova Scotia’s highest spending visitors are those who arrive by air. Strategically improving air access to the province through direct flights will provide a significant opportunity to attract more high-value international visitors.
The Province of Nova Scotia, through its inclusive economic growth strategic imperative, has embraced the Ivany Report tourism expansion goal to increase tourism revenues to $4 billion by 2024.

In 2019-20, Tourism Nova Scotia will focus on activities related to its mandate and strategy to lead sustainable tourism growth in the province.

**Target Key Markets with Consumer-focused Advertising Campaign**

Tourism Nova Scotia reaches its target markets through a consumer-focused advertising campaign featuring TV, search engine marketing (SEM), social media ads, digital video, and digital display units.

In 2019-20, the campaign will continue to target the Cultural Explorer and Authentic Experiencer Explorer Quotient® segments in key geographic markets (see tourismns.ca for more information on Explorer Quotient©). The campaign will build on the success of 2018-19’s creative strategy to increase awareness of, and interest in, Nova Scotia as a vacation destination by highlighting the breadth of experiences and activities in the province. The 2018-19 campaign performed very well in terms of generating interest and influencing travel to Nova Scotia.

**Engage Travel Influencers**

Tourism Nova Scotia will deliver a media relations strategy to extend the consumer marketing campaign and motivate travel through travel writers/influencers. This includes hosting qualified travel writers and influencers on press trips throughout the province who in turn will produce and share content (e.g., stories, videos, photos) with their audiences.
Leverage Strategic Partnerships to Extend Reach

Marketing reach will be extended through strategic initiatives with partners to align tourism marketing investments at a provincial, Atlantic, and national level. Key initiatives for 2019-20 include:

• Co-investment with tourism operators through the Digital Content Marketing program to extend operators’ marketing reach and develop marketing assets. The program provides choice for partners to co-invest in digital marketing and/or content asset development. The 2019-20 Digital Content Marketing program replaces the separate Inspiring Content and Digital Marketing programs with a more efficient combined program that offers the same activities through a streamlined application process;

• Strategic co-investment partnerships with Destination Canada to leverage Destination Canada’s scale and reach across the direct-to-consumer, trade, and media channels in key international markets under the Canada brand; and

• Co-investment with the Atlantic Canada Opportunities Agency (ACOA) and the Atlantic provinces to extend reach in key international markets through direct-to-consumer advertising, media, and trade activities. In 2019-20, Tourism Nova Scotia will continue its participation in the Atlantic Canada Agreement on Tourism (ACAT) and the Tourism International Market Expansion project (TIME) to support the growth of a vibrant tourism economy for Nova Scotia.

Develop Key Markets through Trade Marketing Initiatives

The travel trade strategy engages international inbound tour operators and travel agencies to extend consumer reach and sales through product development, training, and partnership marketing.

This strategy is supported by in-market representatives in the UK, Germany, and China markets. The in-market representatives provide on-the-ground support to increase awareness of Nova Scotia as a vacation destination. They facilitate opportunities with travel trade (tour operators, travel agents), travel media, and other partners (e.g., airlines, Destination Canada) in all target markets. Activities in 2019-20 include:

• Attendance at business-to-business marketplaces;

• Tour operator sales calls;

• Familiarization tours for tour operators and travel writers/influencers; and

• Co-operative marketing partnerships.
Leverage International Air Access

Air access is key to attracting international visitors to the province. Nova Scotia’s highest-spending visitors are those who arrive by air. Nova Scotia has a strong competitive advantage within Atlantic Canada to attract international flights, as Halifax Stanfield International Airport is Atlantic Canada’s largest airport and the regional gateway hub of Atlantic Canada. 2019-20 marketing activities support increasing awareness and consideration of Nova Scotia as a vacation destination in strategic air markets. Tourism Nova Scotia will continue to work with Halifax International Airport Authority to influence the International Air Service Investment.

Evolve Nova Scotia’s Online Tourism Presence

Sustainable tourism growth requires anticipating and adapting to evolving consumer behaviour. In 2019-20, Tourism Nova Scotia will evolve its flagship consumer-focused website, NovaScotia.com, to optimize the site for mobile users, strengthen the content to inspire travellers to choose Nova Scotia as their vacation destination, and streamline the travel planning process to quickly connect travellers with tourism operators.

Lead Experience Development

Experience development is a key strategic imperative for Tourism Nova Scotia. The experience development process inspires tourism operators to innovate and embrace change to create unique and authentic Nova Scotia experiences that engage and delight visitors.

In 2019-20, Tourism Nova Scotia will partner with tourism operators through the World-class Experience EXCELlerator program to develop experiences that will attract high-value visitors to the province. Activities in 2019-20 will support the province’s inclusive economic growth strategy; specifically, the EXCELlerator program will expand to include collaboration with industry to work towards the development of Indigenous, African Nova Scotian, and off-peak seasonal experiences.

To support partners that have already developed experiences, Tourism Nova Scotia will conduct coaching and mentoring to enhance partners’ ability to market their experiences and attract visitors to Nova Scotia.

The Competitive Edge program will co-invest in strategic competitive initiatives to develop new products, improve market readiness, and enhance the quality of visitor experiences and existing products (e.g., culinary experiences, cycling).
**Enhance Market Readiness and Quality**

There is a significant opportunity for industry to be market ready to attract and accommodate more international visitors. In 2019-20, Tourism Nova Scotia will introduce Tourism Export EXCellerator (E²) initiatives to support industry as it builds capacity to conduct business in international markets and provide quality services to international visitors. Tourism Export EXCellerator activities in 2019-20 include:

- Delivering travel trade readiness training workshops based on the pan-Atlantic curriculum developed in 2017-18, leveraging Tourism Atlantic funding as part of the Atlantic Growth Strategy; and
- Working with participants post-workshop to provide coaching and mentoring as they work to establish business relationships with key tourism operators.

Other 2019-20 activities to develop operators’ export readiness include:

- Partnering with TIANS to increase industry’s technology readiness through webinars, web assessments/reviews, and coaching; and
- Cost-sharing projects with other Atlantic provinces and ACOA to increase capacity and readiness of Indigenous tourism operators.

**Facilitate Industry Growth**

Tourism Nova Scotia will partner with sector associations and industry to enhance operator market readiness and quality to support the delivery of world-class experiences. Export and travel trade readiness training activities in 2019-20 include:

- In-person workshops;
- Webinars; and
- One-on-one mentoring and coaching.

Tourism Nova Scotia will promote and encourage participation by industry in various trade activities. Travel media marketplaces give operators the opportunity to access international travel media and influencers. In 2019-20, these opportunities include:

- Rendez-vous Canada;
- GoMedia Marketplace;
- Atlantic Canada Showcase; and
- Tour Operator Partnership program.
The 2017 *Accommodations Needs Assessment* report identified significant opportunities to improve both the quality and quantity of accommodations in Nova Scotia. Recognizing the important role that accommodations contribute to reaching the $4 billion tourism revenues goal, Tourism Nova Scotia will develop an accommodations-focused workplan in 2019-20 to direct efforts towards business outreach, investment attraction, quality improvements, and industry/community partnerships. Tourism Nova Scotia will also support the development of an Enhanced Quality program for existing accommodations.

Tourism growth will require increasing the supply of qualified labour. In 2019-20, Tourism Nova Scotia will support the Nova Scotia Tourism Human Resource Council, whose role is to promote and support the development of a skilled and professional workforce for Nova Scotia’s tourism industry.

**Invest in Key Tourism Sites**

Tourism Nova Scotia is responsible for administering the Tourism Revitalization of Icons Program (TRIP). Through this program, the provincial government is investing $6 million to enhance five iconic tourism sites: the Cabot Trail; Halifax waterfront; Lunenburg waterfront; Peggy’s Cove; and the Bay of Fundy including Annapolis Royal. Investing in infrastructure improvements at these iconic locations will create more opportunities for the private sector to develop world-class experiences that appeal to target markets and increase visitor spending.

In 2019-20, investments will be made through strategic partnerships to support planning and infrastructure improvements in these iconic tourism sites. Where possible, program investments will leverage partner funds and federal, provincial, and municipal funding.
Build Nova Scotia’s Tourism Confidence

Communications activities in 2019-20 will focus on enhanced stakeholder engagement and building Nova Scotia’s tourism confidence. Strong leadership from Tourism Nova Scotia is necessary to achieve role clarity, reduce duplication, foster stakeholder alignment with the Tourism Nova Scotia strategy, and rally the industry to embrace the changes and opportunities that are key to reaching the $4 billion goal. In 2019-20, through stakeholder outreach initiatives, Tourism Nova Scotia will encourage industry, government, and community tourism stakeholders to align with the tourism strategy and invest in visitor products, experiences, infrastructure, and community development initiatives that will create the conditions for ongoing tourism growth. Tourism Nova Scotia will also inform, engage, and inspire Nova Scotians to be proud of who we are as a tourism destination.

Communications activities in 2019-20 include:

- A communications campaign to inspire Nova Scotians to feel proud of who we are as a tourism destination and what we have to offer visitors, and to be confident and excited about opportunities that exist for Nova Scotians within the tourism sector;
- Industry and stakeholder information sessions to encourage action against the strategy, and rally industry and stakeholders to embrace the “strategic game changers” that are key to reaching the $4 billion goal;
- Regular articles in Tourism Nova Scotia’s blog/newsletter, inTouch, to inform tourism operators about business development and promotional opportunities;
- Proactive social and traditional media outreach to share information and celebrate industry successes; and

Tourism Nova Scotia’s corporate website, tourismns.ca, will continue to be the primary source of information for industry, featuring timely and relevant news, advertising opportunities, industry partnership programs, and tourism performance indicators.
Deepen Understanding of Nova Scotia’s Target Markets
Tourism Nova Scotia conducts research to identify and deepen understanding of Nova Scotia’s target markets, and to support Tourism Nova Scotia program evaluation. Key activities for 2019-20 include:

• Development of key tourism indicators, including visitation estimates;
• Advertising campaign evaluation;
• Experience development concept testing; and
• Program evaluation to support Tourism Nova Scotia programs.

Tourism Nova Scotia will conduct the 2019 Visitor Exit Survey from January 1, 2019 to December 31, 2019. The Visitor Exit Survey is the most comprehensive survey of visitors to Nova Scotia. It provides a detailed profile of visitors, including purpose of trip, travel party composition, types of accommodations used, participation in activities, spending, and community visitation.

Other Responsibilities/Services
In addition to the key 2019-20 activities that align with Tourism Nova Scotia’s mandate and strategy, Tourism Nova Scotia provides support to the tourism industry in the following areas:

• Tourism Nova Scotia operates six provincial Visitor Information Centres (VICs) at Halifax Stanfield International Airport, Halifax waterfront, Amherst, Yarmouth, Peggy’s Cove, and Port Hastings. The VIC staff promote Nova Scotia’s world-class experiences to visitors by providing travel planning information, and encourage increased spending and length of stay. Tourism Nova Scotia is committed to supporting visitor servicing and will continue to investigate evolving models of visitor servicing;
• Tourism Nova Scotia supports local communities’ ability to deliver visitor servicing by providing funding for local visitor information centres; and
• The Tourism Contact Centre promotes Nova Scotia’s world-class experiences to potential visitors looking for travel planning information.
OUTCOMES AND PERFORMANCE MEASURES

Tourism Nova Scotia works to maximize the value of tourism to the province. Through its activities, Tourism Nova Scotia creates the conditions that will generate interest in Nova Scotia as a vacation destination, and lead to visitation.

It is important to note that Tourism Nova Scotia does not directly influence all visitation to Nova Scotia or the resulting visitor expenditures.

Outcome: Increase visitation and tourism spending through strategic marketing activities

Tourism Nova Scotia’s annual advertising campaign influences visitation to Nova Scotia from key target markets. In 2018, Tourism Nova Scotia commissioned a marketing return on investment (ROI) study. This study estimated that for each $1 invested in media buy in Tourism Nova Scotia’s target markets, visitation influenced by the campaign generated $26 in tourism spending in Nova Scotia, a strong result for the 2018 campaign.

In 2019-20, Tourism Nova Scotia will work to support and increase the already high level of tourism spending influenced by the annual advertising campaign.

Outcome: Infrastructure improvements to create opportunities for experience development

Tourism Nova Scotia is administering the Tourism Revitalization of Icons (TRIP) program. The program will enhance five iconic tourism sites: the Cabot Trail; Halifax waterfront; Lunenburg waterfront; Peggy’s Cove; and the Bay of Fundy including Annapolis Royal. Investing in infrastructure improvements at these iconic locations will create more opportunities for the private sector to develop world-class experiences that appeal to target markets, and increase visitor spending.

In 2019-20, Tourism Nova Scotia will identify and review at least six projects to be assessed through the TRIP program criteria.

By the end of 2019-20, Tourism Nova Scotia will have completed or initiated $3 million of infrastructure projects that align with TRIP objectives.
Outcome: World-class experiences that attract first-time visitors to Nova Scotia

Tourism Nova Scotia directly influences the development of world-class experiences that motivate travel to Nova Scotia. The experience concepts that are developed into purchasable experiences are evaluated through research to ensure they are highly appealing to Tourism Nova Scotia’s target markets.

In 2019-20, Tourism Nova Scotia will lead the development of 10 world-class experiences, including Indigenous, African Nova Scotian, and off-peak seasonal experiences.

Outcome: Increase Nova Scotia’s tourism confidence

Tourism Nova Scotia’s mandate includes collaboration and communication with tourism stakeholders. Having an engaged tourism industry and a population that supports and understands the value of Nova Scotia’s tourism sector will provide a positive environment for industry growth.

Tourism Nova Scotia offers and participates in several co-investment initiatives that extend reach in target markets. Co-investment with Tourism Nova Scotia is contingent upon the partner being confident that investing with Tourism Nova Scotia will lead to growth. In 2019-20, Tourism Nova Scotia will continue to build Nova Scotia’s tourism confidence by attracting and leveraging co-investment revenues from partners, including Nova Scotia tourism operators, Destination Canada, the Atlantic Provinces, ACOA, and Halifax International Airport Authority.

In 2019-20, Tourism Nova Scotia will attract at least $1 in matching investment for each $1 it co-invests with partners, a 1:1 leverage ratio.

Each year, Tourism Nova Scotia assesses the perceived importance of the tourism industry to the provincial economy, and pride of place among Nova Scotians.

In 2019-20, Tourism Nova Scotia will work to support the already exceptionally strong recognition of the importance of, and pride in, the tourism industry among Nova Scotia residents.

### IMPORTANCE OF TOURISM TO THE PROVINCIAL ECONOMY (% INDICATING ‘CRITICALLY IMPORTANT’)

<table>
<thead>
<tr>
<th>Year</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>61%</td>
<td>62%</td>
<td>62%</td>
</tr>
</tbody>
</table>

### I AM PROUD OF WHAT NOVA SCOTIA OFFERS TO VISITORS (% AGREING)

<table>
<thead>
<tr>
<th>Year</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>91%</td>
<td>94%</td>
<td>94%</td>
</tr>
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</table>

Source: Tourism Nova Scotia Annual Public Opinion Survey
The tourism industry’s ability to align efforts towards the $4 billion tourism revenues goal is contingent on engagement across the industry to achieve support for the tourism strategy. Tourism Nova Scotia, through stakeholder outreach, works to inform, influence, and inspire stakeholders to embrace activities that will grow tourism in the province. Familiarity with Tourism Nova Scotia’s strategy and being satisfied with Tourism Nova Scotia’s performance are important indicators of stakeholder engagement.

In 2019-20, Tourism Nova Scotia will work to increase stakeholder familiarity with the tourism strategy by five percentage points over the previous year.

**TOURISM STAKEHOLDER AWARENESS OF TOURISM NOVA SCOTIA’S STRATEGIC PILLARS**
(% indicating ‘Yes, aware’)

<table>
<thead>
<tr>
<th>Strategic Pillar</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
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<tbody>
<tr>
<td>Attract first-time visitors</td>
<td>56%</td>
<td>55%</td>
<td>66%</td>
</tr>
<tr>
<td>Invest in markets of highest return</td>
<td>35%</td>
<td>33%</td>
<td>45%</td>
</tr>
<tr>
<td>Focus on world-class experiences</td>
<td>48%</td>
<td>51%</td>
<td>64%</td>
</tr>
<tr>
<td>Build Nova Scotia’s tourism confidence</td>
<td>29%</td>
<td>32%</td>
<td>45%</td>
</tr>
</tbody>
</table>

Source: Tourism Nova Scotia Annual Stakeholder Survey

Tourism Nova Scotia will also work to increase stakeholder satisfaction with the corporation’s performance by five percentage points over the previous year.

**TOURISM STAKEHOLDER SATISFACTION WITH TOURISM NOVA SCOTIA’S PERFORMANCE**
(% rating 8, 9, or 10 on 10-point scale)

<table>
<thead>
<tr>
<th>Year</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>33%</td>
<td>31%</td>
<td>44%</td>
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Source: Tourism Nova Scotia Annual Stakeholder Survey
# OPERATING BUDGET

<table>
<thead>
<tr>
<th></th>
<th>2018-19 Estimate ($)</th>
<th>2018-19 Forecast ($)</th>
<th>2019-20 Estimate ($)</th>
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</thead>
<tbody>
<tr>
<td><strong>Revenue</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provincial Operating Grant</td>
<td>21,291,000</td>
<td>21,826,000</td>
<td>22,507,000</td>
</tr>
<tr>
<td>Tourism Recoveries</td>
<td>728,900</td>
<td>1,326,300</td>
<td>550,000</td>
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<tr>
<td>Tourism Fees &amp; Charges</td>
<td>734,000</td>
<td>580,000</td>
<td>652,200</td>
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<tr>
<td><strong>Total Revenue</strong></td>
<td>22,753,900</td>
<td>23,732,300</td>
<td>23,709,200</td>
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<tr>
<td><strong>Expenses</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CEO &amp; Board Administration</td>
<td>357,400</td>
<td>377,000</td>
<td>363,400</td>
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<td>Corporate Services</td>
<td>6,706,500</td>
<td>6,358,200</td>
<td>6,279,500</td>
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<td>Research and Policy</td>
<td>399,000</td>
<td>962,900</td>
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<td>Marketing</td>
<td>13,084,200</td>
<td>13,716,800</td>
<td>12,891,400</td>
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<td>Sector Development</td>
<td>2,206,800</td>
<td>2,317,400</td>
<td>3,122,600</td>
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<tr>
<td><strong>Total Expenses</strong></td>
<td>22,753,900</td>
<td>23,732,300</td>
<td>23,709,200</td>
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<tr>
<td><strong>Surplus (Deficit)</strong></td>
<td>-</td>
<td>-</td>
<td>-</td>
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