



Opening video link: <https://youtu.be/oKvsF7v4gNc>

As some of you know, I moved here a year and half ago from Vancouver to join Tourism Nova Scotia, and I can honestly say I feel more at home than any other place I've lived. I'm so proud to be working with all of you to bring more visitors to the province, so they too can experience the beautiful people, communities, activities and attractions that make Nova Scotia so unique and special.

Like many of you, I've worked in the tourism industry my entire career and I absolutely love it! I love it because tourism is fun, but more importantly, it's a fast-paced, global business sector that is the economic backbone of many rural communities, cities, provinces, states, and countries around the world.




Thinking about the future in the context of “What if...?” is the theme of my presentation today. It’s amazing how one little question can trigger so many reactions – fear, regret, hope, creativity, inspiration...

As I reflect on some of the great things that have happened this year and share what’s on the horizon, let’s think about what we’ve learned, where we’re going, and how we can continue to grow our tourism industry over the long term. Let’s envision the possibilities through the lens of **“What if?”**

GLOBAL TOURISM IMPACT

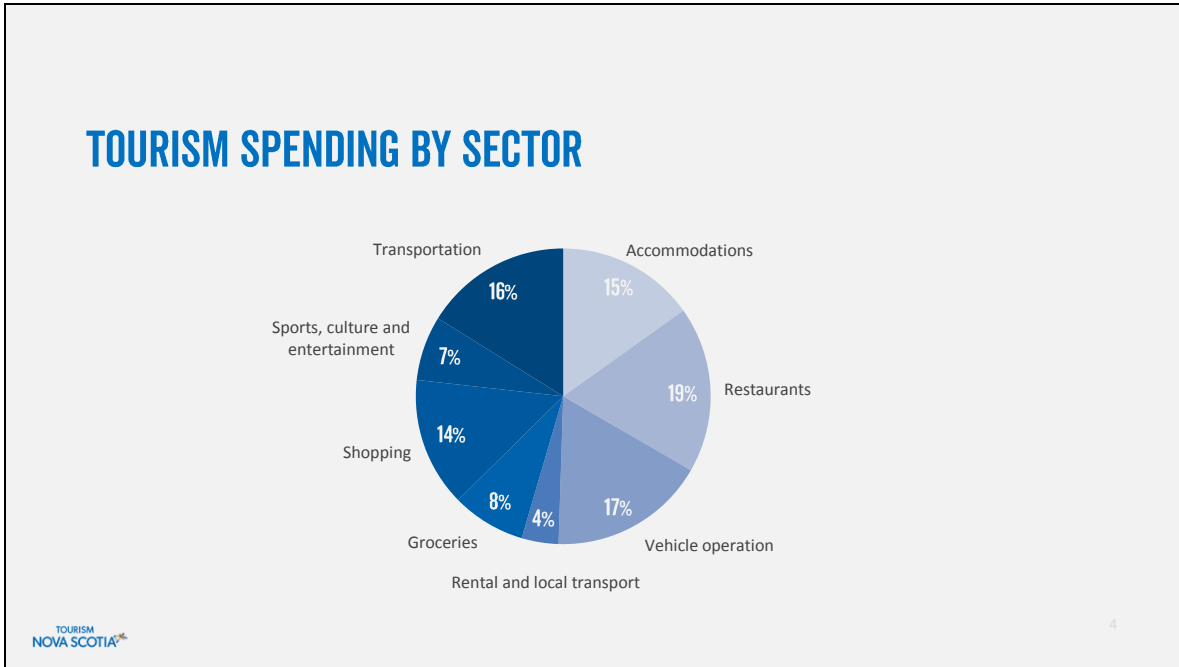
- \$7.6 trillion US
- 10.2% of GDP
- 1 in 10 of all jobs on the planet

Source: World Travel and Tourism Council



TOURISM
NOVA SCOTIA

According to the World Travel and Tourism Council, the tourism industry contributes \$7.6 trillion dollars USD, or 10.2% of global gross domestic product, and accounts for 1 in 10 of all jobs on the planet. Tourism spurs innovation and entrepreneurship in communities of all sizes.



As you can see from this chart, by welcoming more visitors to Nova Scotia, we’re enabling growth across many sectors. What may surprise you, is that accommodations account for just 15 per cent of all tourism spending in the province. Whether visitors are staying in licensed accommodations, with friends or relatives or elsewhere, one thing is clear: we need places for people to stay for tourism revenues to grow.

TOURISM INDUSTRY GOAL (2014)



Double tourism revenues within 10 years

\$4 BILLION BY 2024

As you know, Nova Scotia’s tourism industry has a goal to double annual tourism revenues over a ten-year period to \$4 billion by 2024. Tourism Nova Scotia tracks our industry’s progress against this goal annually. Looking back to when the Ivany Commission released its *Now or Never Report* in 2014, the Commission called it “an urgent call to action for Nova Scotians to help improve the province’s economic outlook.”


We (tourism businesses, governments, and communities) rose to the challenge and quickly aligned behind the \$4 billion goal. We did so because we believe we *can* have a more profitable, sustainable tourism industry in Nova Scotia, and we know that our efforts will have a lasting impact on future generations. In some instances, we have put our personal or local interests aside to pursue opportunities that will deliver greater results for our province. Some of us have had to shift how we operate and perhaps even reinvent ourselves. All of us are persevering through change with our sights set on the future.

2017 OUTPERFORMING 2016!

Year-to-Date September

- 2 million non-resident overnight visitors
- Non-resident overnight visitation up 9%
- 162,000 more visitors than 2016
- Tourism revenue forecast to reach \$2.7 billion by the end of 2017

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First, I want to congratulate all of you on what's been another banner year for tourism in Nova Scotia. While full-year estimates won't be available until February, the numbers we have today tell a fantastic story!

As of the end of September, we've welcomed nearly 2 million non-resident overnight visitors to the province, which is 9 per cent more compared to last year. Preliminary estimates suggest tourism revenues will reach \$2.7 billion dollars by the end of the year—that's \$100 million more than last year, and \$700 million more than just three years ago. Isn't that incredible? These results are not by chance. We're working hard, we're working collaboratively, and we're working strategically to inspire people to choose Nova Scotia.

PARKS CANADA VISITATION

- Kejimikujik National Park (+62%)
- Citadel Hill (+55%)
- Fort Anne & Port-Royal (+53%)
- Grand-Pré (+56%)
- Fortress of Louisbourg (+48%)
- Cape Breton Highlands National Park (+6%)
- Alexander Graham Bell Museum (+35%)



This year, Canada's 150th birthday enticed visitors to travel within Canada and explore all that we have to offer as a destination. Parks Canada's free admission and innovative guest programming contributed to double-digit visitation growth at almost all of their sites across Nova Scotia.



We also celebrated Canada's 150th birthday with major events like the **Rendez-Vous 2017 Tall Ships Regatta**, which drew visitors to the Halifax Waterfront and 10 other ports across the province between June 30 and August 16. Each port showcased what makes their community unique and special, incorporating culinary, entertainment and historical elements into their programming. No two ports were alike, and locals and visitors enjoyed free access to tall ships from around the world. Congratulations to Jen Angel and her team at Waterfront Development and to each host community for bringing this event to life.



The Tall Ships Regatta wasn't the only major event that played a part in motivating travel to the province this year. The **Celtic Colours International Festival**, which takes place every year across Cape Breton Island, welcomed thousands of festival-goers from all corners of the world. We celebrate the "What if...?" passion behind this festival and everything it has done over the past 20 years to motivate travel and boost business during the month of October.

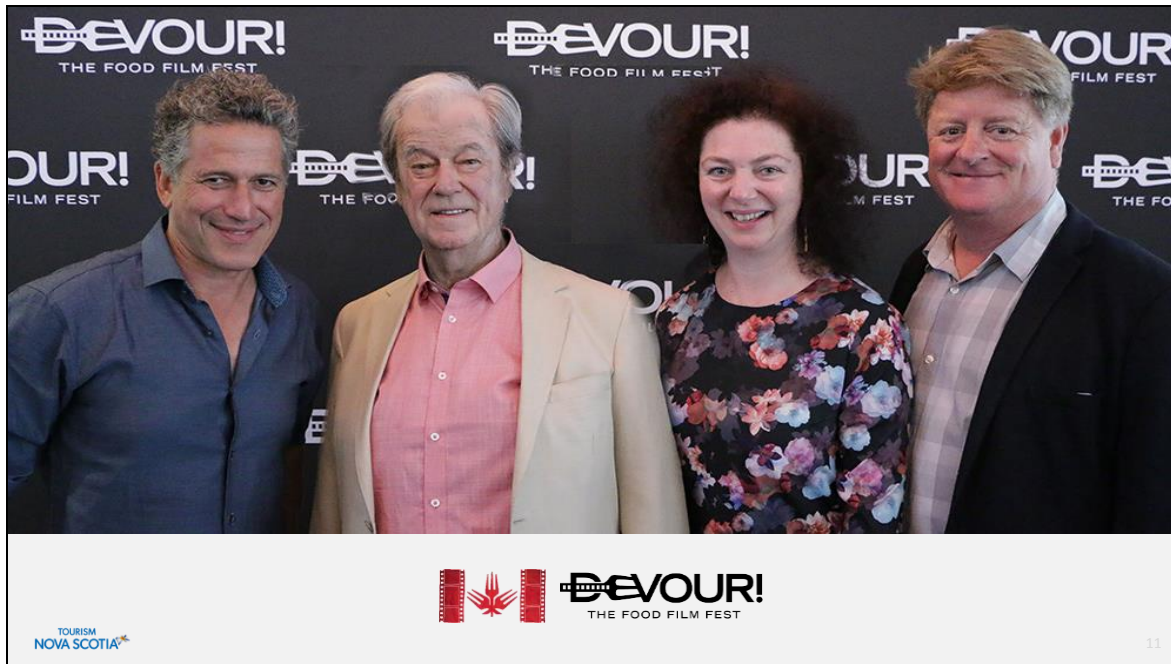


CELTIC COLOURS INTERNATIONAL FESTIVAL

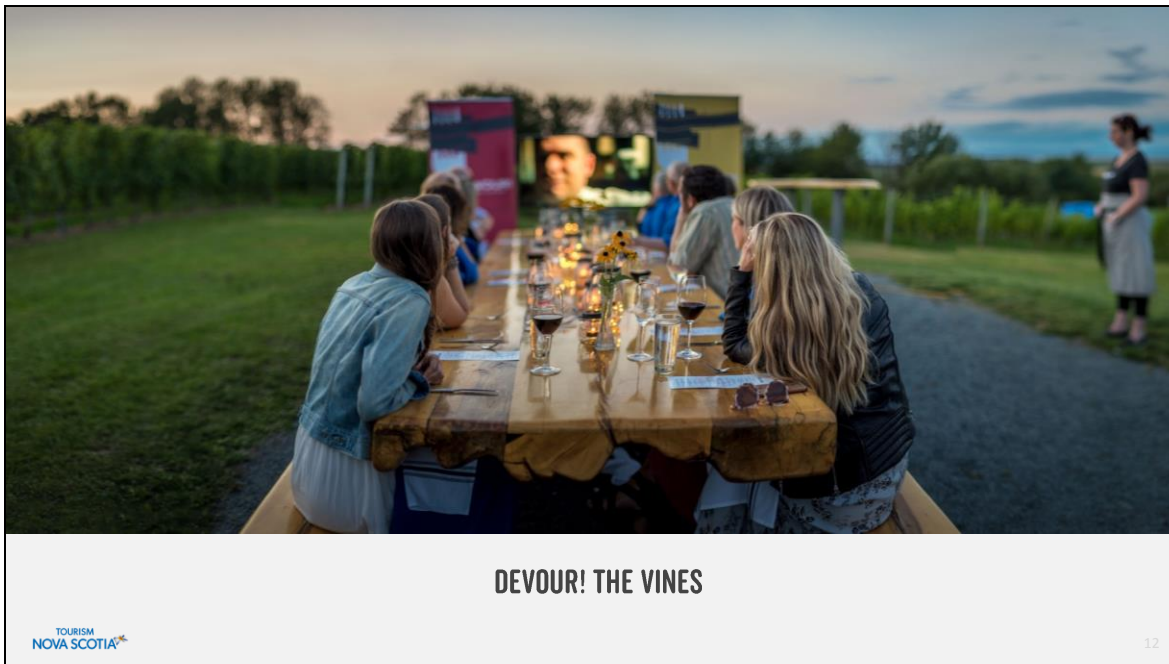


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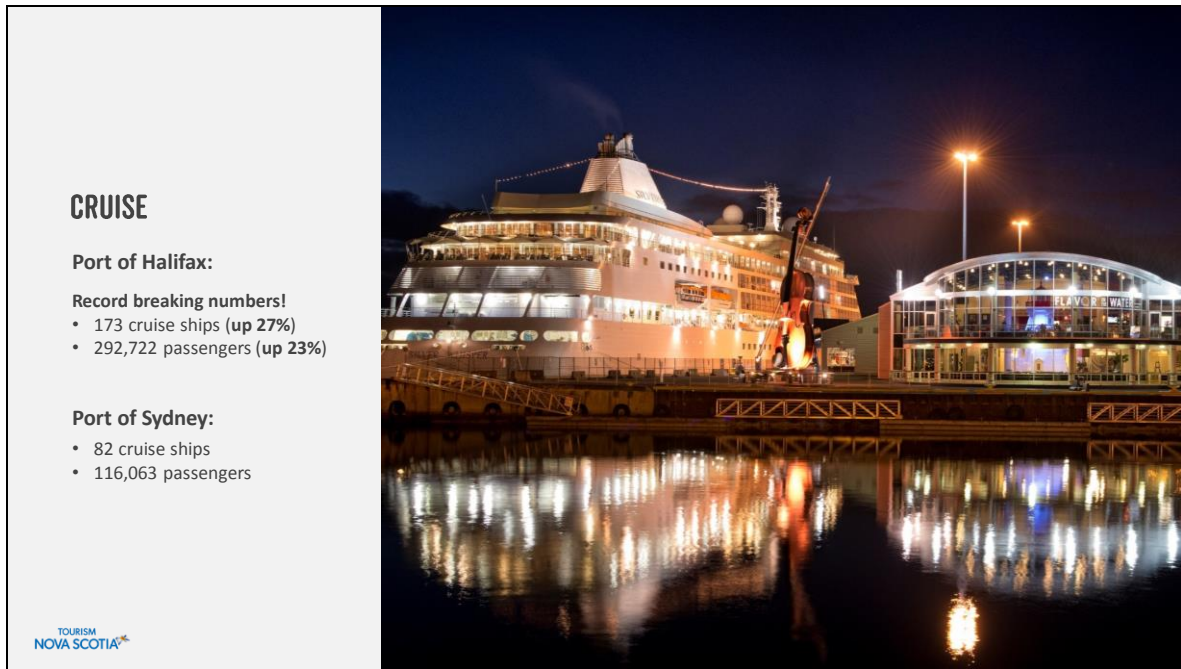
From community suppers to cultural immersion experiences, festival guests are wowed by the warm hospitality of locals, amazing musical performances, and the beauty of Cape Breton. I got to experience it myself this year and I loved the whole experience.



Another major event that is helping to extend the tourism season (which is so very important) in the Annapolis Valley is **Devour! The Food Film Fest**. This year's festival, which also happens to be the world's largest gastronomic film festival, took place from October 25-29 offering five days of film, food and wine experiences. Momentum for this event continues to grow. **Devour!** has hosted celebrities Gordon Piment, Jason Priestly and Anthony Bourdain to name a few, and has caught the attention of international media.



Festival creators Michael Howell, Lia Rinaldo, and the team at Devour are an inspiring group of “What if...?” thinkers! Not only have they developed partnerships to maximize opportunities and impact, but they are continually coming up with ways to improve the experience for festival goers. This year, they partnered with **Grape Escapes Nova Scotia Wine Tours** to offer shuttle service from Halifax to Wolfville, expanding travel and accommodation options for attendees. They’ve also extended beyond their festival week to offer satellite Devour food and film experiences throughout the year.



CRUISE

Port of Halifax:

Record breaking numbers!

- 173 cruise ships (up 27%)
- 292,722 passengers (up 23%)

Port of Sydney:

- 82 cruise ships
- 116,063 passengers

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Another important aspect of our tourism industry is the cruise business. Cruise ships bring thousands of visitors to Nova Scotia every year via two large ports in Halifax and Sydney, and various small ports along our coasts. According to the Halifax Port Authority, 173 cruise ships visited Halifax this year carrying 292,722 passengers. These are record-breaking numbers which account for a 27% increase in vessel calls and 23% increase in passengers. The Port of Sydney welcomed 82 cruise ships and almost 120,000 passengers. Fantastic!

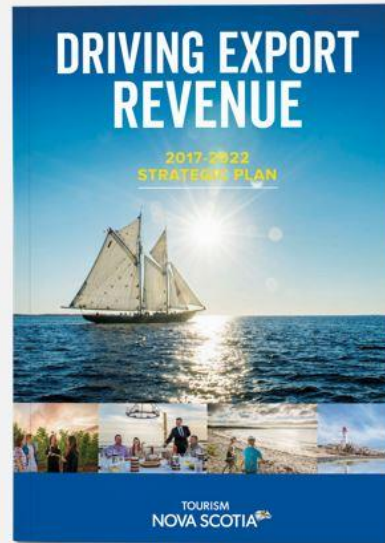


In addition to retailers, restaurants and attractions, local tourism operators benefit greatly from cruise business. For example, in Cape Breton, **Eskasoni Cultural Journeys**, a unique Mi'kmaq experience provider, hosted 62 cruise ship tours between May and October. They provided cruise ship passengers with hands-on cultural tours on Goat Island, giving them a glimpse into traditional Mi'kmaq ways of life through authentic activities, like smudging ceremonies, learning the art of basketry, and joining in traditional dance.

There are so many great stories out there. I wish we could highlight them all. My colleagues and I at Tourism Nova Scotia certainly love hearing about them, so please don't hesitate to reach out and share them with us.

2017-2022 STRATEGIC PLAN

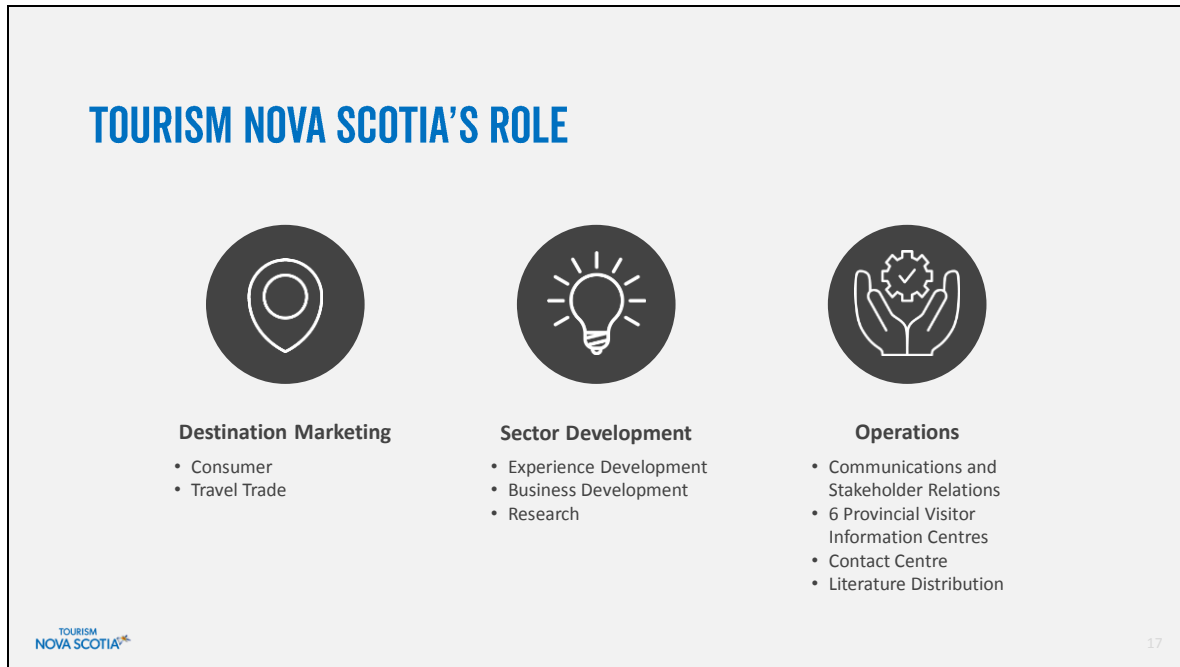
- Tourism Nova Scotia's Strategy to help lead the growth of the industry
- Stakeholder Roles, Situational Analysis, Market Profiles
- Non-resident, first-time visitors
- World-class Experiences



As you know, Tourism Nova Scotia's mandate is to lead the growth of Nova Scotia's tourism industry and maximize the value of tourism to Nova Scotia's economy. Today, we're pleased to share our five-year strategic plan, *Growing Export Revenue*, with you. This is Tourism Nova Scotia's strategy. It helps our employees, our shareholder, tourism businesses and other stakeholders understand why, how, and what we are going to do to deliver on our mandate. It expands on the strategic framework we have been talking about since 2015 when Tourism Nova Scotia was first created.



Our strategic pillars remain the same; however, this document provides more context and rationale for how we will partner and invest our resources to drive tourism growth. We're attracting first-time visitors; investing in markets of highest return; focusing on world-class experiences that will motivate travel to the province; and we're working to build tourism confidence.



It's clear when you read this plan that Tourism Nova Scotia is not a catch-all organization. We're a Crown corporation that is in the business of destination marketing, and experience and business development. We operate provincial visitor information centres and provide a range of other services to visitors and industry partners. Our primary focus, however, is bringing new money into our economy. To help avoid duplication and make limited resources go further, our strategy clarifies roles for all tourism stakeholders and encourages innovation, collaboration and private-sector initiative.

INDUSTRY'S ROLE



- Close the sale**
pre-trip and during trip
- Drive **repeat visitation**
by exceeding visitor expectations
- Invest** in product
- Deliver **world class experiences**

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The role of tourism operators and businesses is to offer the types of experiences and products that visitors want, and to make those cash registers ring. Tourism businesses are uniquely positioned to deliver exceptional service and memorable experiences that will encourage repeat visitation and lead to glowing reviews on platforms like Trip Advisor.

COMMUNITY'S ROLE



Partner with industry
to deliver destination
development and
marketing




Visitor servicing

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Community's role (which includes municipalities, regional marketing associations, events, and organizations with tourism interests) is to work with businesses to give people a reason to come to a given area and spend money. It's about destination development and marketing that will drive business growth and job creation. Another important role for communities is visitor servicing. Offering amenities like parking and public washrooms is important. Making sure locals know what's going on so they can tell people what they can do is also key to reaching \$4 billion in tourism revenues by 2024.

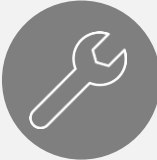
GOVERNMENT'S ROLE



Consider policy agenda in support of goal




Community economic development




Attraction of inward investment



Infrastructure development


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Government's role is to enable tourism growth by implementing policies and making investments in programs and infrastructure that will improve the operating environment for tourism businesses. Aside from Tourism Nova Scotia, other provincial government departments and organizations deliver programs and services that create economic opportunities for communities and support tourism growth.



Gran Fondo Baie Sainte-Marie

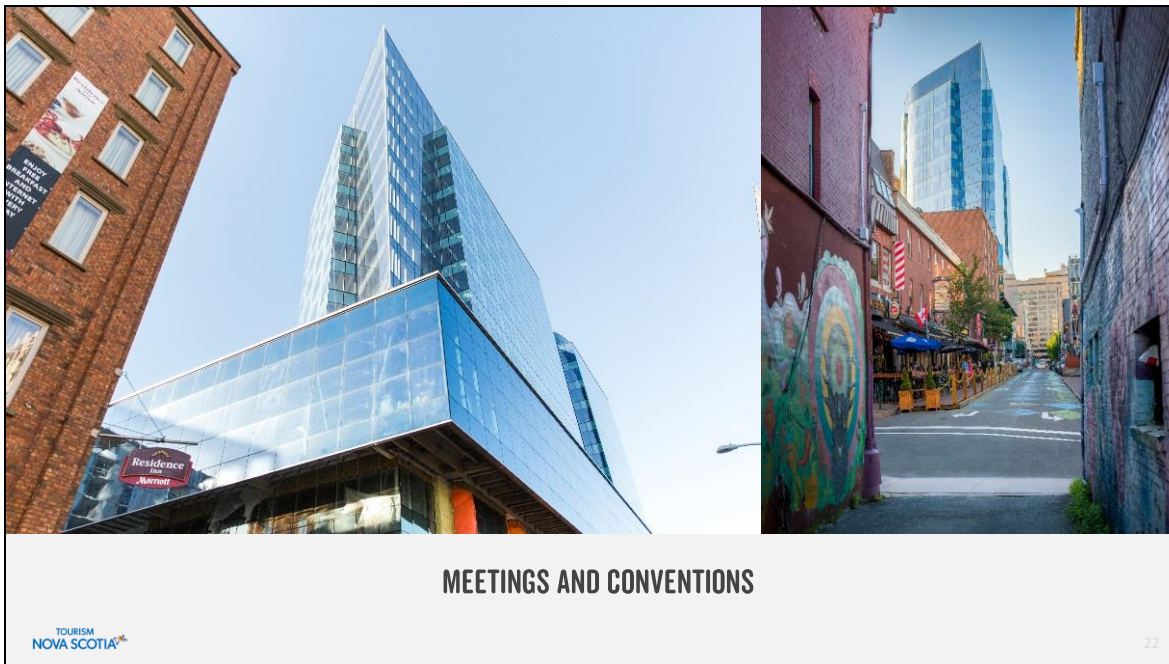
Royal Nova Scotia International Tattoo

EVENTS

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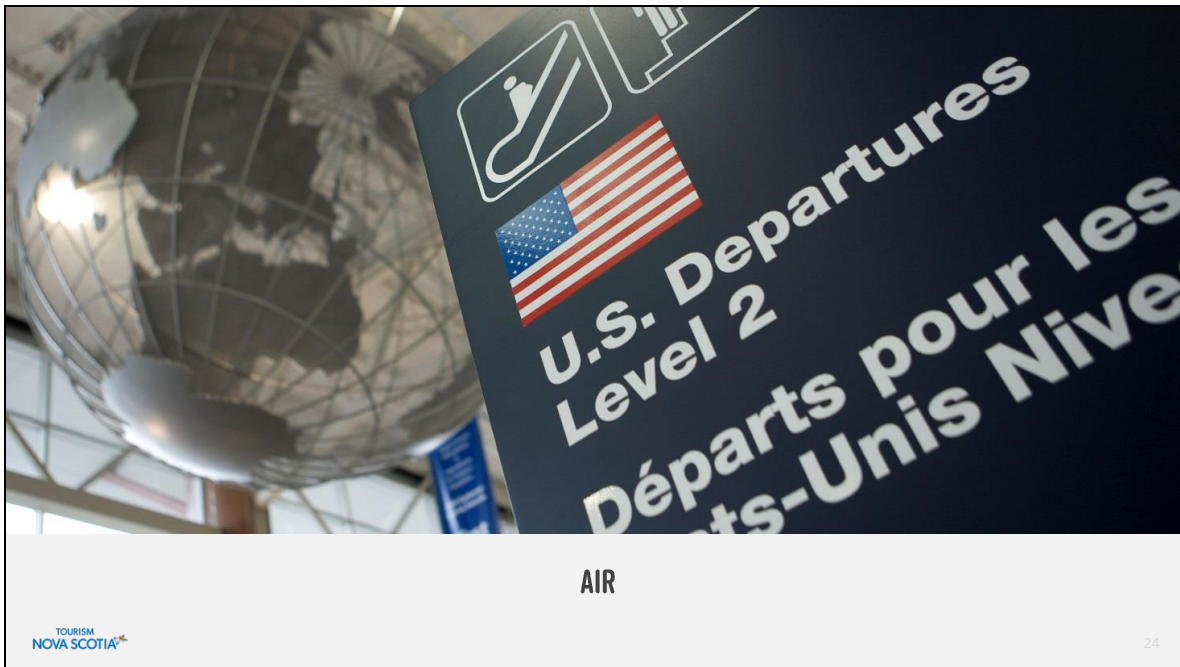
As an example, funding for major events rests with the Department of Communities, Culture and Heritage, while roads and ferry service are the responsibility of the Department of Transportation and Infrastructure Renewal.



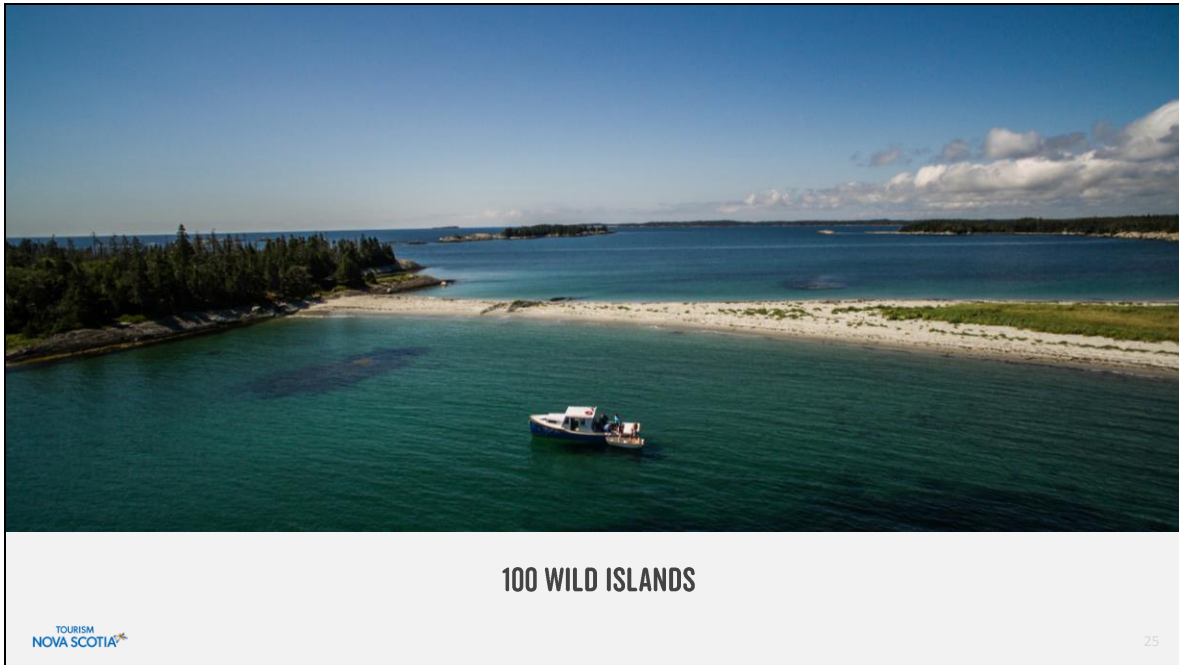
Discover Halifax and **Events East** are two organizations focused on attracting meeting and convention visitors to the province. Meetings and conventions are big drivers for visitation. Visitors here on business will often make a vacation of their trip and travel around the province either before or after their event. In some cases, they even return to enjoy more of Nova Scotia at another time. I started my career in the meetings sector, and I can hardly wait to see visitors enjoying the new Halifax Convention Centre which is just weeks away from opening. I've been in many convention centres over the years, and we should be very proud to have this state of the art facility in Nova Scotia! Kudos to Carrie Cussons and the team at Events East for working to incorporate hints of Nova Scotia into the overall convention experience.



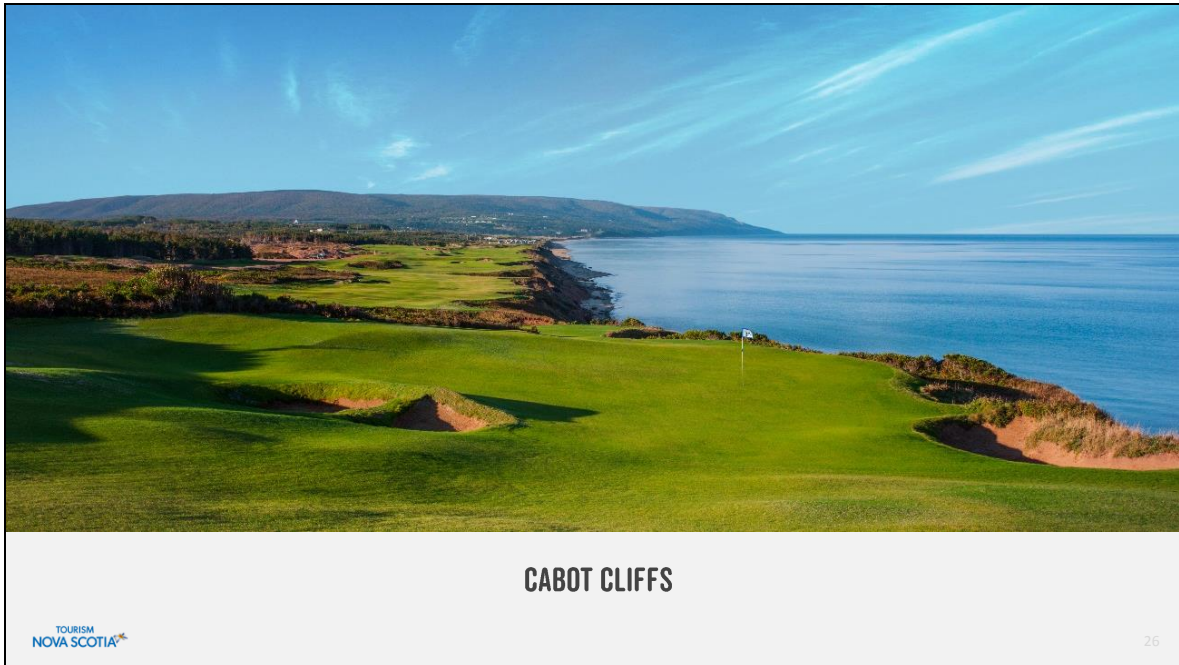
The Tourism Industry Association of Nova Scotia is the advocacy group for the industry. They're the ones who work to advance issues and opportunities that are important to you, their members, government, and other stakeholders as necessary. The Nova Scotia Tourism Human Resources Council is leading the charge in working with government, educational institutions, and other stakeholders provincially and nationally to address human resource and skills requirements of tourism businesses.



Halifax Stanfield International Airport, in partnership with the provincial government and Tourism Nova Scotia, is working to secure and maintain air routes that align with our priority tourism markets.



Municipalities and community tourism organizations are working together to develop their destinations. Initiatives like the **Wild Islands Tourism Advancement Partnership** on the Eastern Shore, and the **Cape d’Or Masterplan** on the Bay of Fundy will help make these destinations even more enticing for visitors. Private sector businesses are investing in quality improvements and new infrastructure that will not only meet the expectations of travellers, but add to our cachet as a tourism destination.



Cabot Links and Cabot Cliffs are a fine example of what a bold “What if...?” vision can do for a community and a destination. Cabot continues to receive significant media exposure, which is heightening the profile of Cape Breton. This year, 48 per cent of guests were from the United States and other international markets, while 27 per cent were from Ontario, and the remainder were from Atlantic Canada. These numbers support the notion that if you build it, they will come. Now let’s look at some other investments made in 2017.



The advertisement for Water Sprite Bed & Breakfast is split into two panels. The left panel shows the exterior of a three-story white house with a wrap-around porch and a dormer window under a clear blue sky. The right panel shows an interior view of a living room with a fireplace, a painting of sailboats, a blue armchair with a yellow pillow, and a small dog sitting on a colorful rug. The text 'WATER SPRITE BED & BREAKFAST' is overlaid on the blue background of the left panel.

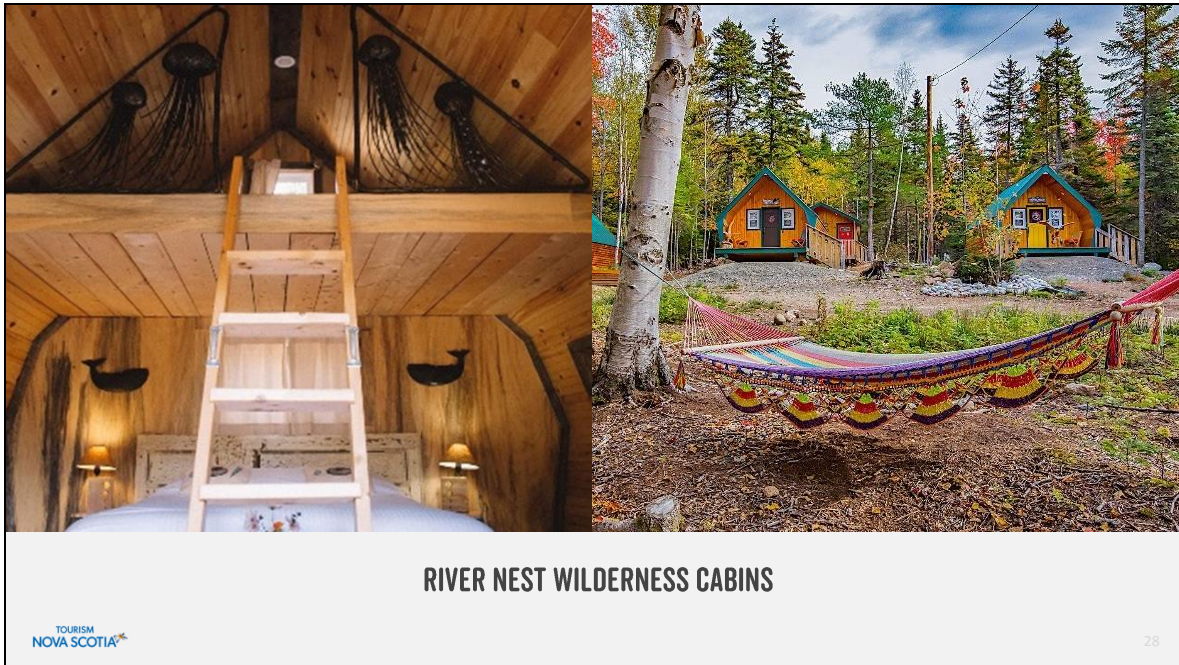
ACCOMMODATION STATS

23 new licensed fixed roof accommodations, 7 new campgrounds

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In total, 23 new licensed fixed roof accommodations and seven new campgrounds came online this year.

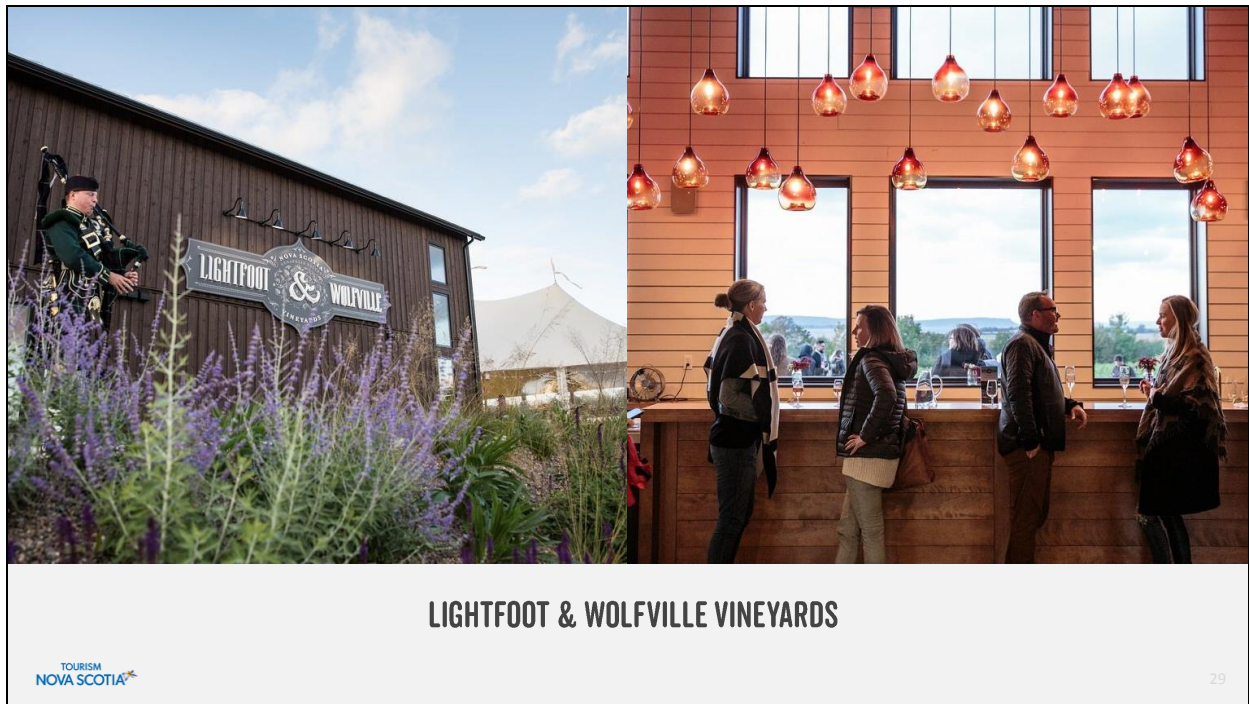


RIVER NEST WILDERNESS CABINS

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How charming are these rustic little cabins located along the Murray River in North River, Cape Breton? Angelo Spinazzolla, owner of North River Kayaks, is the founder and craftsman behind these custom cabins. Congratulations Angelo for blending unique accommodations with exciting activities for visitors. Angelo has leveraged the tools, knowledge and expertise of Tourism Nova Scotia along the way, and our team has thoroughly enjoyed working with him.



It's really exciting to see more private-sector investment happening in Nova Scotia. For those of you who haven't been to Lightfoot and Wolfville Vineyards yet, you can explore Acadian farmland that's been in the Lightfoot family for eight generations, take in stunning views of the Annapolis Valley and sample amazing wines. It's an impressive new addition to the valley's wine and culinary scene. In addition to investing in new business ideas and infrastructure, tourism operators and organizations are also investing in Tourism Nova Scotia's partnership programs to expand their marketing reach and make their marketing budgets go further.

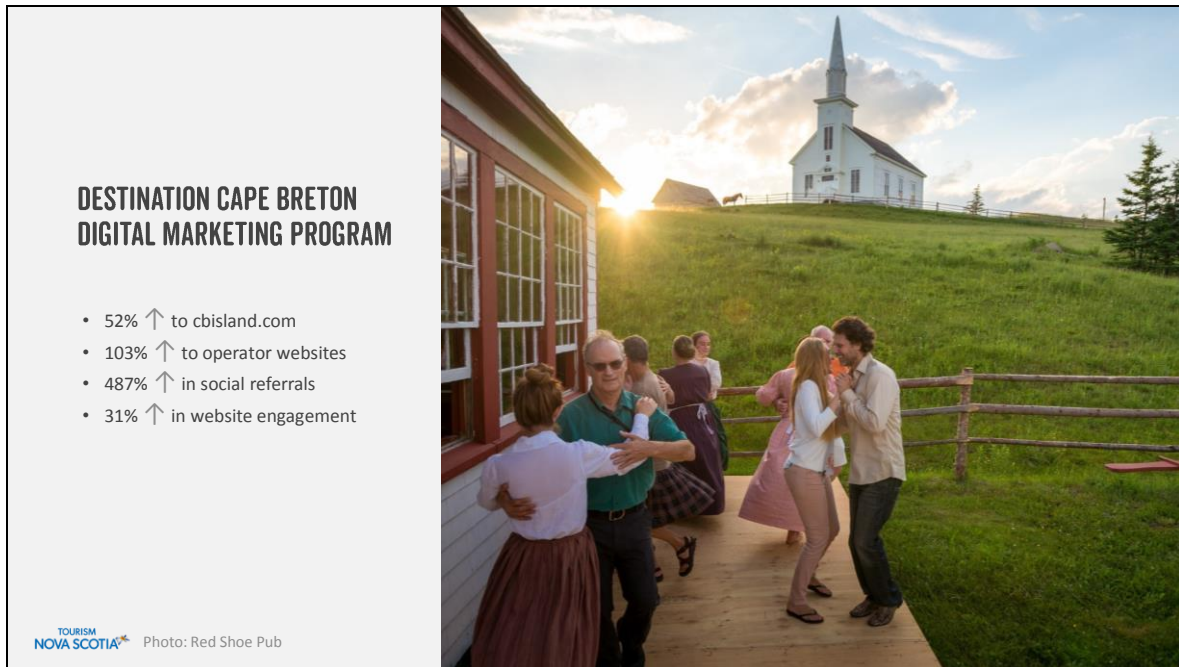
MARKETING PROGRAMS

\$1,047,000
COMBINED INVESTMENT



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In 2017, tourism operators invested over half a million dollars to develop digital marketing campaigns and capture video and photography assets through our **Digital Marketing and Inspiring Content Programs**. Tourism Nova Scotia matched their spend for a combined total investment of approximately one million forty-seven thousand dollars! Through the digital program, our marketing experts, media buyers, and Google Canada worked with program participants to develop and implement customized campaigns with measurable performance objectives. The campaigns included digital display, video, social media and search advertising tactics which ran in key Canadian markets outside of Atlantic Canada and in the Northeast United States.



**DESTINATION CAPE BRETON
DIGITAL MARKETING PROGRAM**

- 52% ↑ to cbisland.com
- 103% ↑ to operator websites
- 487% ↑ in social referrals
- 31% ↑ in website engagement


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NOVA SCOTIA Photo: Red Shoe Pub

Destination Cape Breton was the biggest investor in the program in 2017. Their participation contributed to a 52 per cent increase in website traffic to cbisland.com, when adjusted to remove the 2016 'Trump Bump' traffic. The campaign helped generate a 103 per cent increase in traffic to Cape Breton tourism operators compared to 2016. Social referrals were up 487 per cent, and overall website engagement grew by 31 per cent.

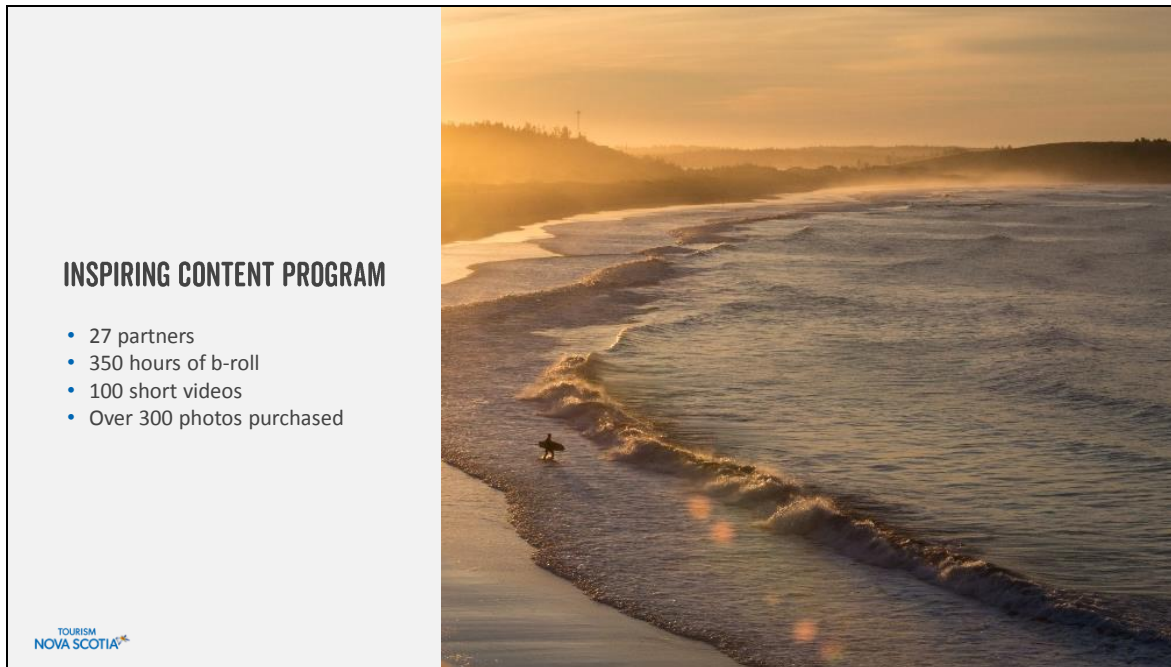
DIGITAL MARKETING PROGRAM RESULTS

56

56 million ad impressions
600,000 leads to operator websites



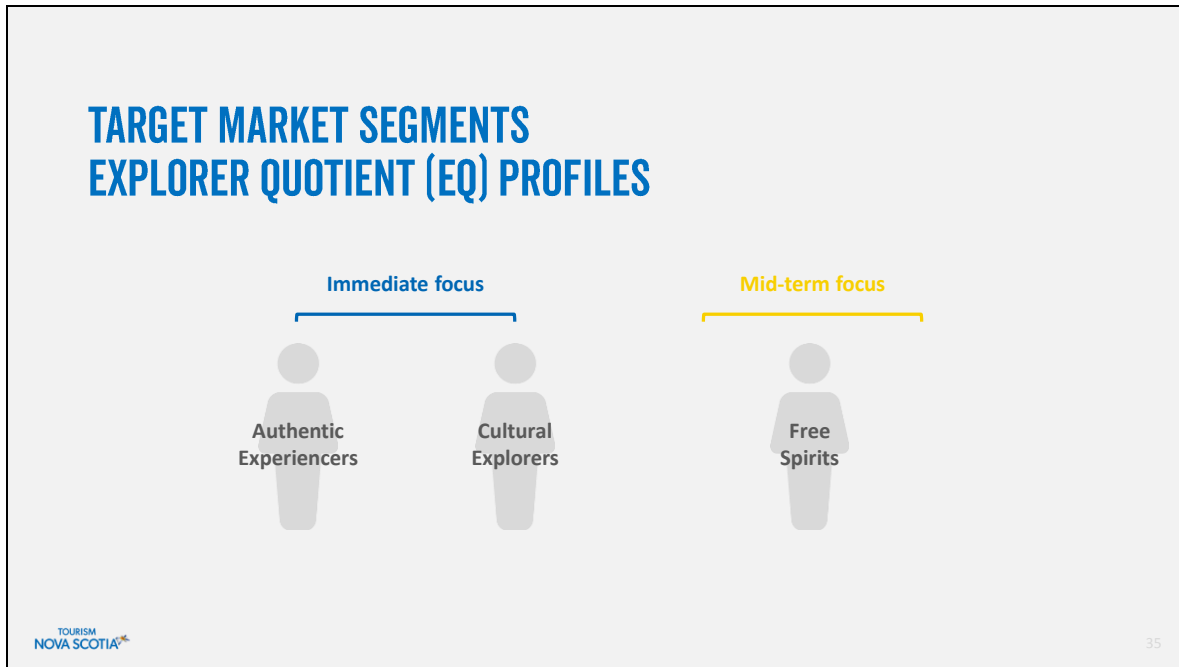
Overall, the **Digital Marketing Program** performed very well for all partners in 2017 with over 56 million ad impressions and over 600,000 leads to operator websites. This program boosts awareness of Nova Scotia as a travel destination and helps move potential visitors along the path to purchase.



Tourism Nova Scotia's other marketing partnership program is the **Inspiring Content Program**. Over the past two years, we've worked with 27 partners to shoot more than 350 hours of b-roll, produce over 100 short videos, and capture over 300 photos. The cost to acquire this content is shared equally between Tourism Nova Scotia and partners, and is used by participants and by Tourism Nova Scotia on novascotia.com, in our marketing campaigns, on social media and in e-newsletters. Take a look at some of the amazing footage we've captured with our partners.



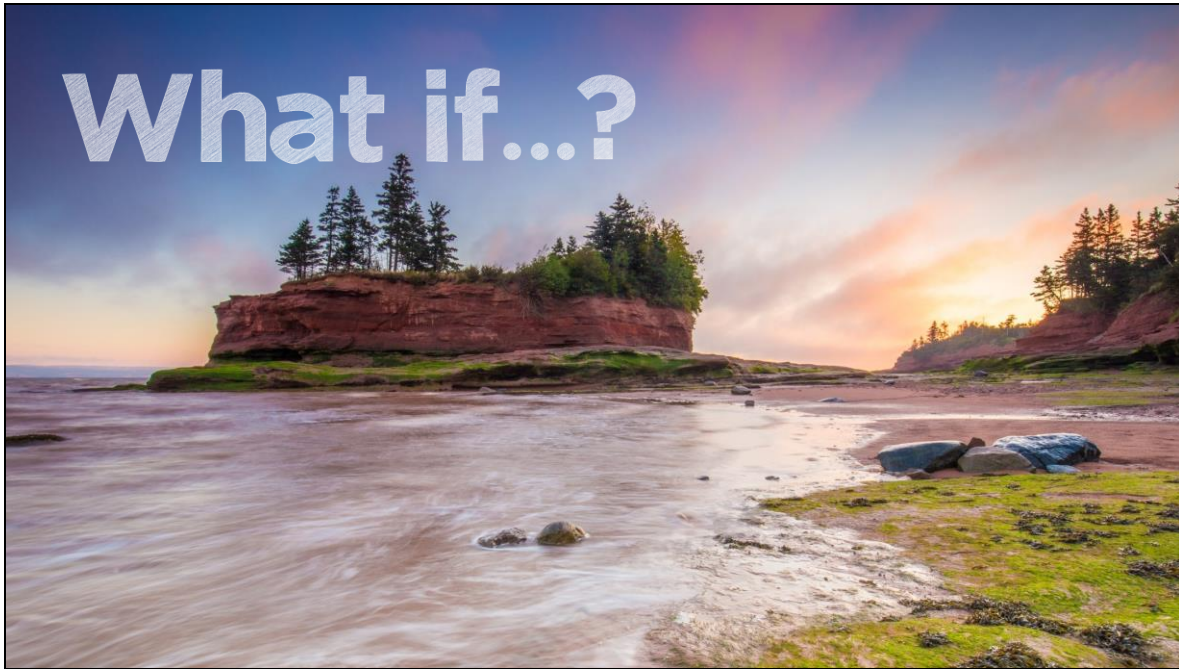
Inspiring content video: <https://youtu.be/fEuOz5SqPJI>



Tourism Nova Scotia also works closely with tourism businesses and organizations to develop experiences that appeal to our three target market segments – the Cultural Explorer, Authentic Experiencer, and Free Spirit.



Through our **World-class Experience EXCELLerator Program**, we work with businesses to create and sell experiences that motivate travel and differentiate Nova Scotia as a destination. They're the type of experiences that get on the cover of magazines, create a buzz, and inspire people to book a trip *now*.




Our experience development team members are “What if...?” experts! Actually, our entire organization is like a “What if...?” incubator. Every day we’re thinking about the future and what we can do to leverage our incredible assets to create meaningful experiences for visitors, and money-making opportunities for our industry. We want Nova Scotia to be the best it can be and we want to share our wonderful people, places and products with the world. Our Experience EXCELLerator Program is a real-life example of what can happen when you think in terms of “What if...?” The program concept was born from the understanding that people need to know what they can do while on vacation in Nova Scotia.

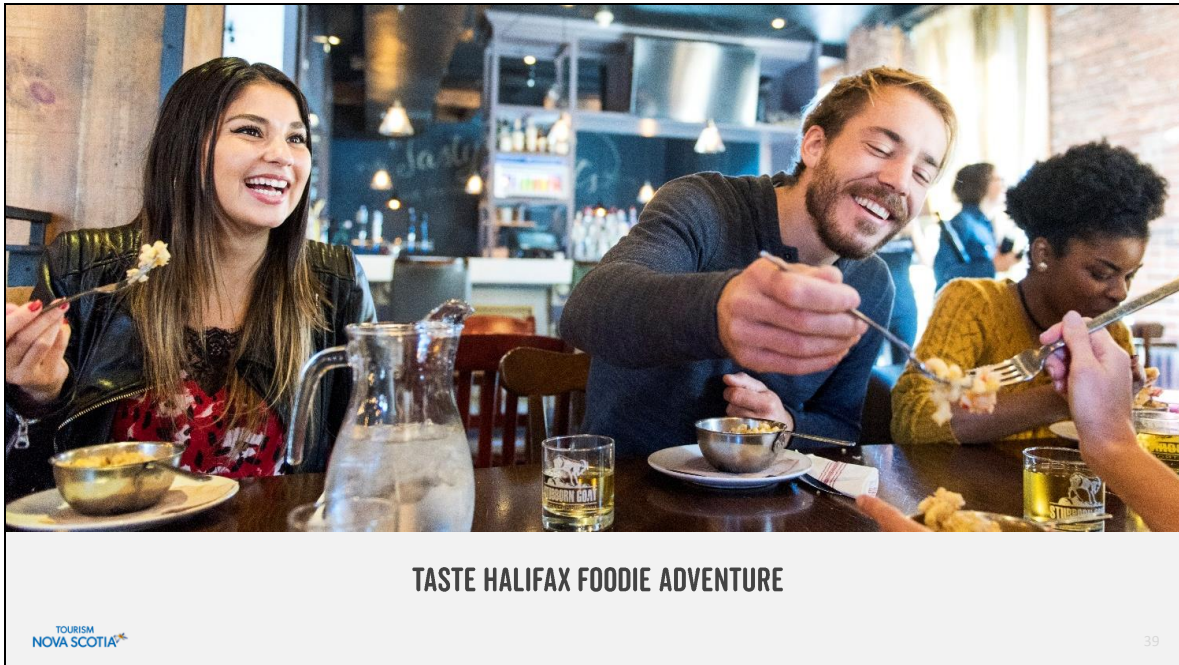
WHAT IF WE...?

- ✓ Came up with compelling experience ideas
- ✓ Tested the ideas with target markets
- ✓ Found partners to develop most appealing experiences

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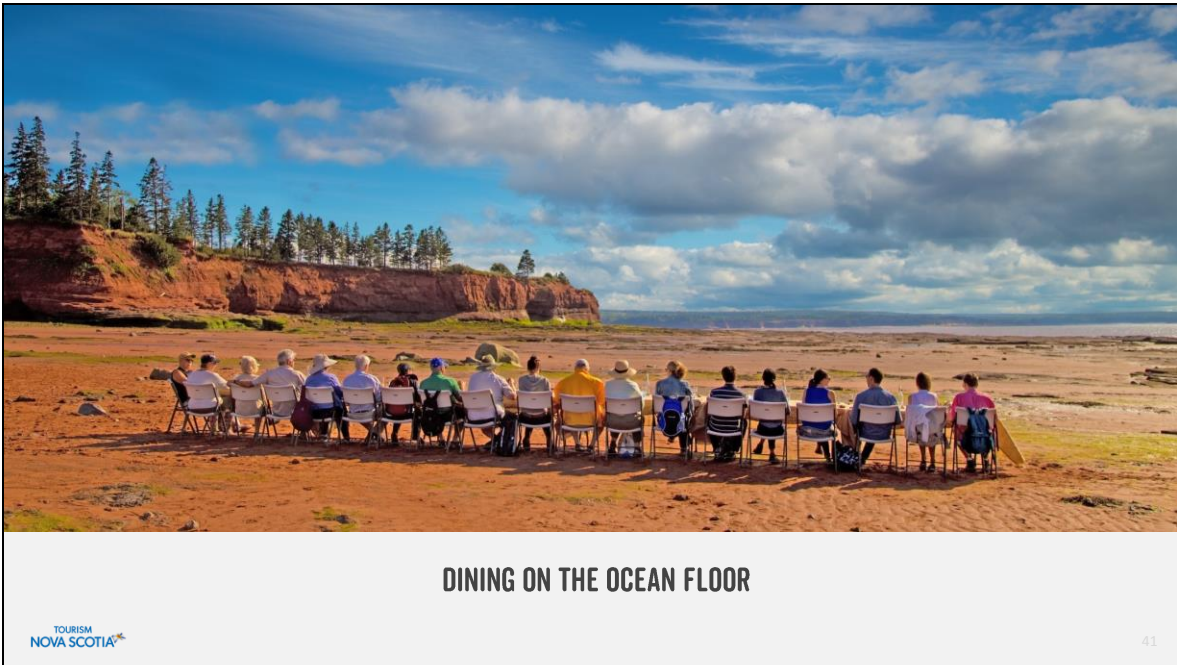
We thought, “What if we come up with experience ideas that visitors want and find partners who are willing to turn the concepts into reality?” And that’s how the program came to be. Through our EXCELLerator Program, we survey potential visitors to see which experiences resonate the most. The concepts that have strong appeal become part of the program. Tourism Nova Scotia then works with selected partners to turn the concepts into purchasable experiences, providing research and coaching along the way, as well as photography and video assets to promote the experiences. I’m pleased to share that the experiences created in 2016 and launched this year have yielded positive results so far.



This is the **Taste Halifax Foodie Adventure**. More than 100 people participated in delicious culinary adventures around the city this year. This cool experience sells for \$149 per person. It's offered every second week throughout the summer and provides guests with an exclusive behind the scenes culinary tour that has never been offered before in Halifax.



Halifax Foodie Adventure video: <https://youtu.be/ESH8jcl8qyE>



This year, the **Flying Apron Inn & Cookery** delivered their experience, Dining on the Ocean Floor, and welcomed over 100 participants. Dining on the Ocean Floor sold out in early March at a price of \$350 per person or \$675 per couple. There are over 700 people anxiously waiting for 2018 dates. This experience has become the poster child for the success of this program.



Dining on the Ocean Floor video: <https://youtu.be/rsQSQfNvmFA>



The **Fundy Geological Museum** Dig for Dinosaurs experience kicked off this summer. Participants got to take a boat tour, dig for fossils, and enjoy a lobster-infused picnic at the cost of \$360 per person. The following video was shared on YouTube, Twitter and Facebook on April 12, 2017. Just six days later, the Facebook post had reached 20,170 people and been viewed nearly 9,000 times.



Dig for Dinos video: <https://youtu.be/Bft7JxtBJ70>

EXCELLERATOR PROGRAM 2017

- 12 new experiences
- 12 new partners
- Available for purchase in 2018

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These are just three examples of the fantastic results we're seeing from our EXCELLerator program so far. The thing I find particularly cool is that our counterparts in other provinces have contacted us to learn how we created this program and how it works because there is such a buzz about it. It's great to be considered a success story and a trailblazer! We're now in our second year of offering this program, and throughout 2017 we've been working with 12 partners to develop 12 NEW experiences that will help build awareness and consideration of Nova Scotia as a vacation destination and boost the bottom line of participating operators. Here are a few of the experiences that will be available for purchase in 2018.



Good Cheer Adventures will be offering a Feast of Good Cheer hosted by Samuel de Champlain at Port Royal (the birthplace of Canada). The experience will showcase our Mi'kmaq and Acadian cultures and fresh seafood.



GOOD CHEER ADVENTURES – FEAST OF GOOD CHEER



GOOD CHEER ADVENTURES – FEAST OF GOOD CHEER





Nova Shores Adventures, a tour operator out of Advocate Harbour, will offer sunrise morning yoga sessions by the Cape d’Or lighthouse, followed by a balsam fir oil massage, breakfast, and a kayak tour on the Bay of Fundy.



NOVASHORES ADVENTURES : SUNRISE YOGA & KAYAK TOUR





NOVASHORES ADVENTURES : SUNRISE YOGA & KAYAK TOUR





NOVASHORES ADVENTURES : SUNRISE YOGA & KAYAK TOUR





This year, **White Point Beach Resort** will offer the Great Canadian Lobster Fishing Feast where visitors can join the crew of the world’s largest lobster fishery for a half-day fishing adventure in the Atlantic Ocean. That evening, they will enjoy fresh lobster caught that day by the lobster crew and warm up by the cozy fire overlooking the beach.



WHITE POINT – GREAT CANADIAN LOBSTER FISHING FEAST



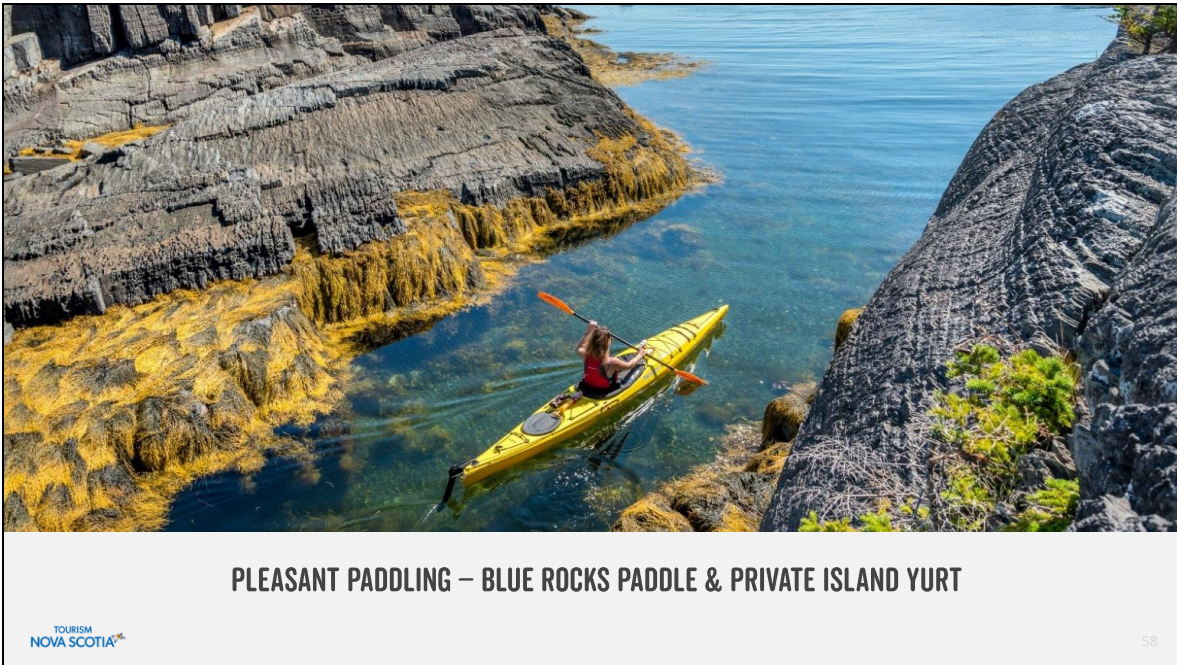
WHITE POINT – GREAT CANADIAN LOBSTER FISHING FEAST





WHITE POINT – GREAT CANADIAN LOBSTER FISHING FEAST





Just outside Lunenburg, **Pleasant Paddling** will offer an exclusive adventure for two, kayaking and cycling around the Blue Rocks islands. Visitors will work up an appetite before retiring to their very own private-island yurt and a delicious local meal.



PLEASANT PADDLING – BLUE ROCKS PADDLE & PRIVATE ISLAND YURT





PLEASANT PADDLING – BLUE ROCKS PADDLE & PRIVATE ISLAND YURT



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PLEASANT PADDLING – BLUE ROCKS PADDLE & PRIVATE ISLAND YURT





CELTIC MUSIC INTERPRETIVE CENTRE : RHYTHM OF THE ISLAND

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The **Celtic Music Interpretive Centre** in Judique will offer visitors an experience that kicks-off with crab cakes and Celtic music, followed by a walk along the Celtic Shores Coastal Trail to a lobster feast overlooking the ocean, before they hop on a lobster boat for a Glenora whiskey tasting and ceilidh. An authentic Cape Breton experience for sure!



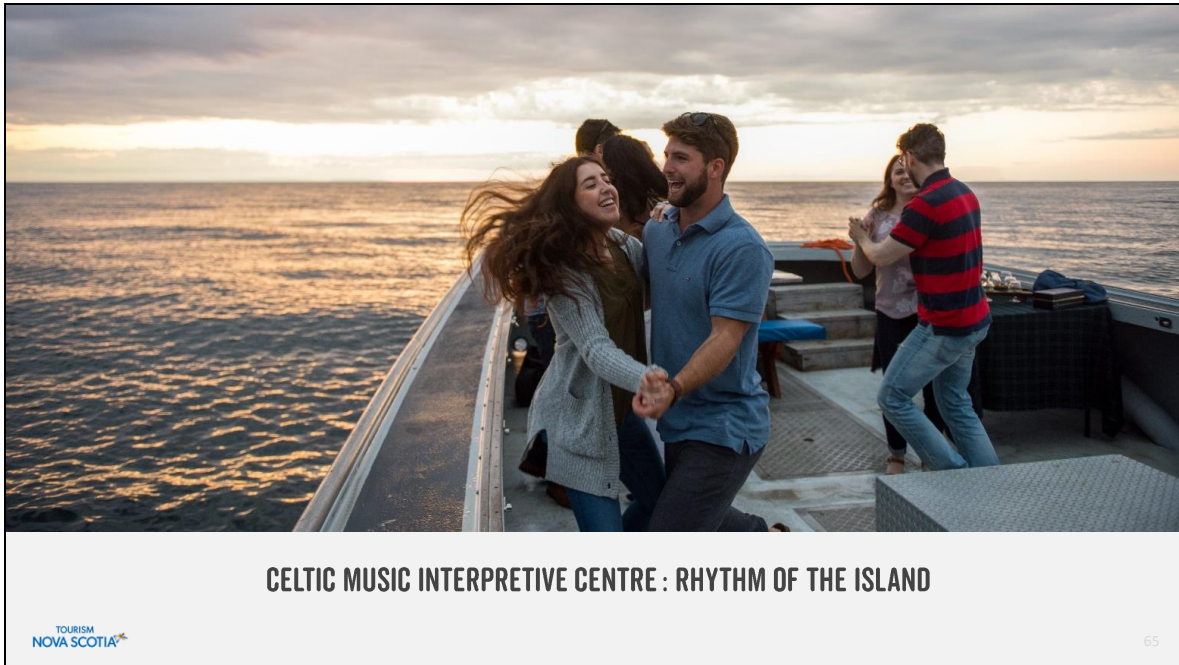
CELTIC MUSIC INTERPRETIVE CENTRE : RHYTHM OF THE ISLAND






CELTIC MUSIC INTERPRETIVE CENTRE : RHYTHM OF THE ISLAND







Building on the success we're seeing from the EXCELLerator Program, and recognizing the opportunity around indigenous and year-round tourism, our team will work with partners on potential concepts which will be tested in 2018. If you're interested in either of these experience development opportunities, please reach out to us. We're always looking for businesses that want to grow by developing new experiences.

KEY MARKETS



				
Canada	United States		International	
Ontario Quebec	Northeast Mid-Atlantic		United Kingdom Germany China	

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As you'll note in our strategic plan, we invest our marketing dollars in the key geographic markets of Ontario, Quebec, Northeastern and mid-Atlantic United States, the United Kingdom, Germany, and China.

VISITATION BY KEY MARKET

January – September, 2017

- Quebec : **20%** ↑
- Ontario : **17%** ↑
- New England : **16%** ↑
- UK : **8%** ↓
- Germany : **26%** ↑

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Visitation from our key markets is up significantly compared to September 2016, except for the UK which is down 8 per cent. After an incredibly successful launch of a new air route between Glasgow and Halifax in 2015 that saw visitation from the UK increase by 49 per cent, we are seeing some softening in visitation, which is to be expected after such strong growth in the first year. Visitation year-to-date September 2017 remains well above 2014 levels, up 26 per cent.



This year, Tourism Nova Scotia's consumer marketing campaign ran in target Canadian markets and the Northeastern and mid-Atlantic US. It included television ads, billboards and digital advertising. The campaign built on key learnings from 2016, which revealed that potential visitors are aware of Nova Scotia, but they're not sure what they would be doing if they were to visit. Here are some of the cool out-of-home billboards we implemented to contrast the things people may know about Nova Scotia with the lesser known aspects of our province.

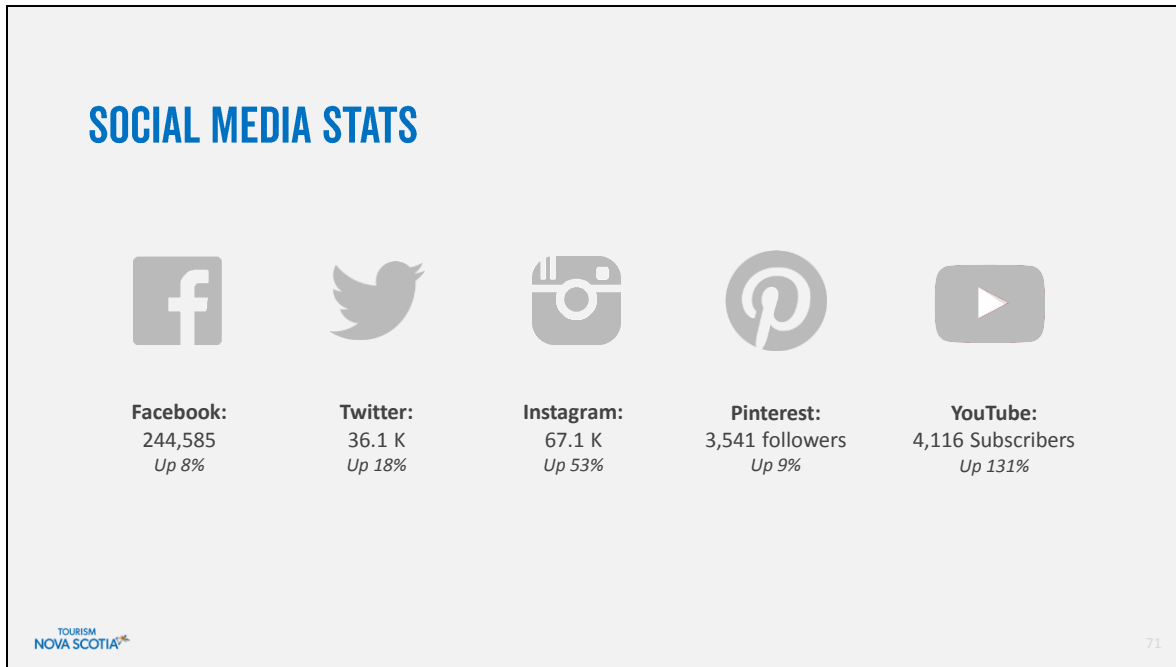


This digital billboard ran in Toronto's Yonge and Dundas for six weeks in April.

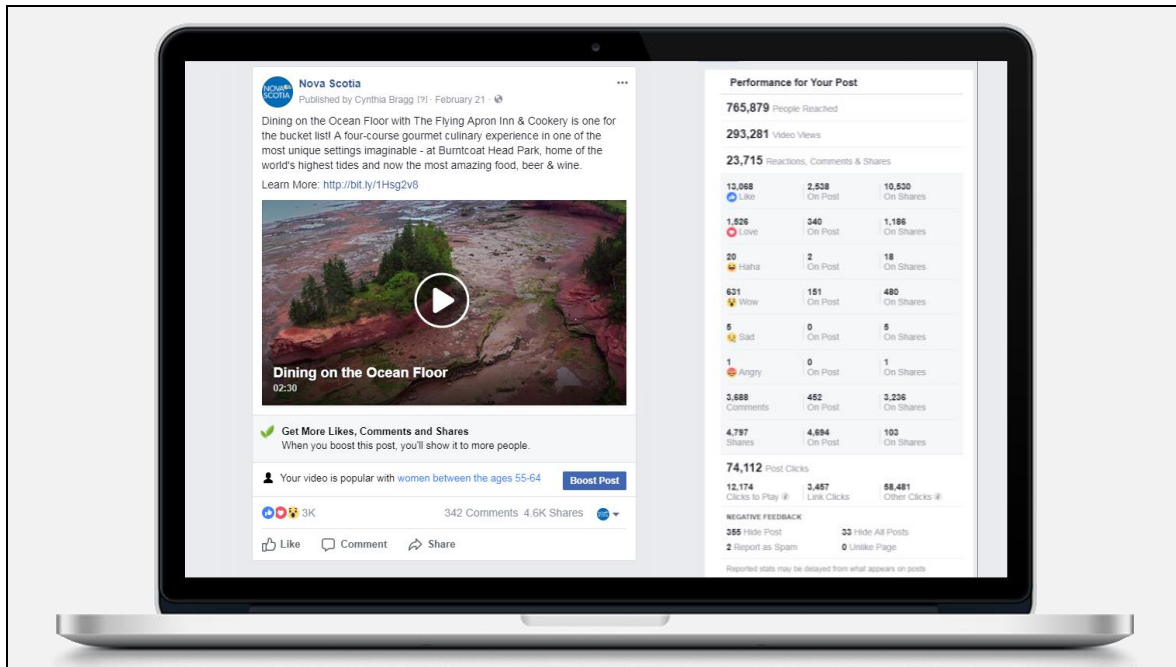


This digital billboard, which combines whale watching with wineries, was on the Gardiner Expressway in Toronto. It was pretty cool to see our whale swimming along the highway while stuck in big city traffic!

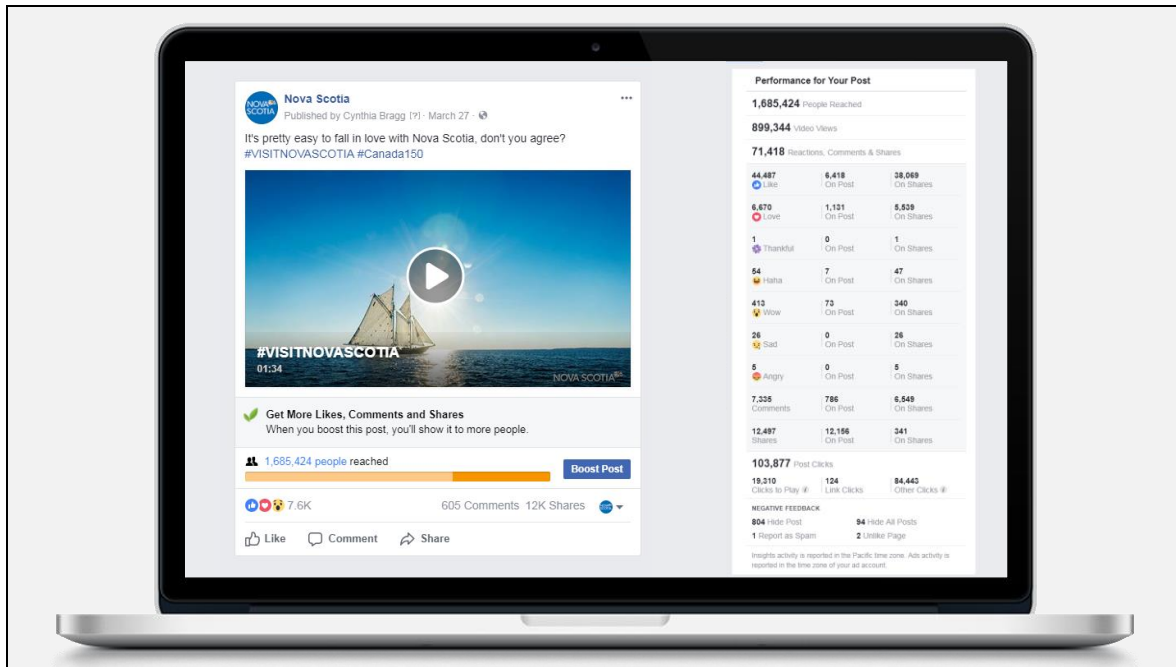
As with all of our marketing efforts, we've measured our 2017 campaign performance and we're thrilled with the results. The campaign surpassed established benchmarks and did an excellent job of increasing awareness of Nova Scotia, influencing desire to visit, and influencing people to come to Nova Scotia in 2017.



With respect to social media marketing, our social networks continue to grow. Most notably Instagram at 53 per cent growth and YouTube at 131 per cent growth. Our YouTube growth can be attributed to the increase in video content that we produced in conjunction with our Inspiring Content and EXCELLerator Program partners.



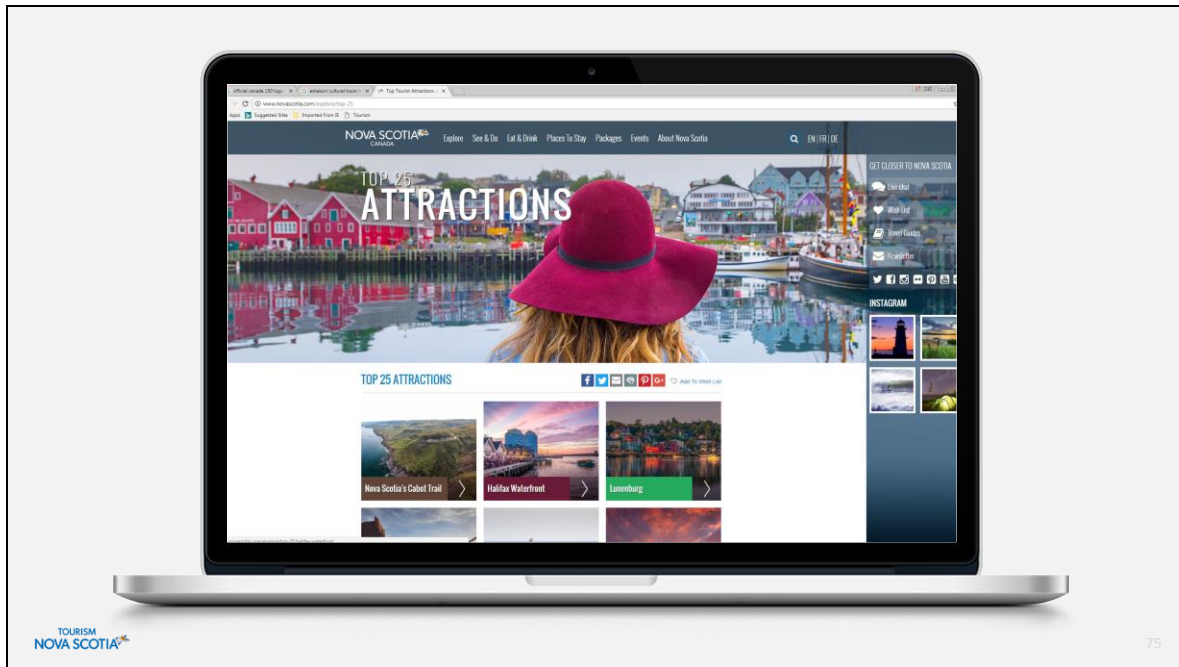
The content we've gained from our Inspiring Content and EXCELLerator Programs has been put to great use on other networks as well. Videos were created for use in various Facebook and Instagram ads. Over the course of our campaign, we reached over 14 million people with over 60.8 million impressions in our target audiences in Northeastern US, Quebec, and Ontario. The content has also been performing well organically on our Facebook channels. The Dining on the Ocean Floor video was a top performing post and reached 765,000 people organically (that means without paid support) and was watched nearly 300,000 times. This is a great example of the EXCELLerator Program in action!



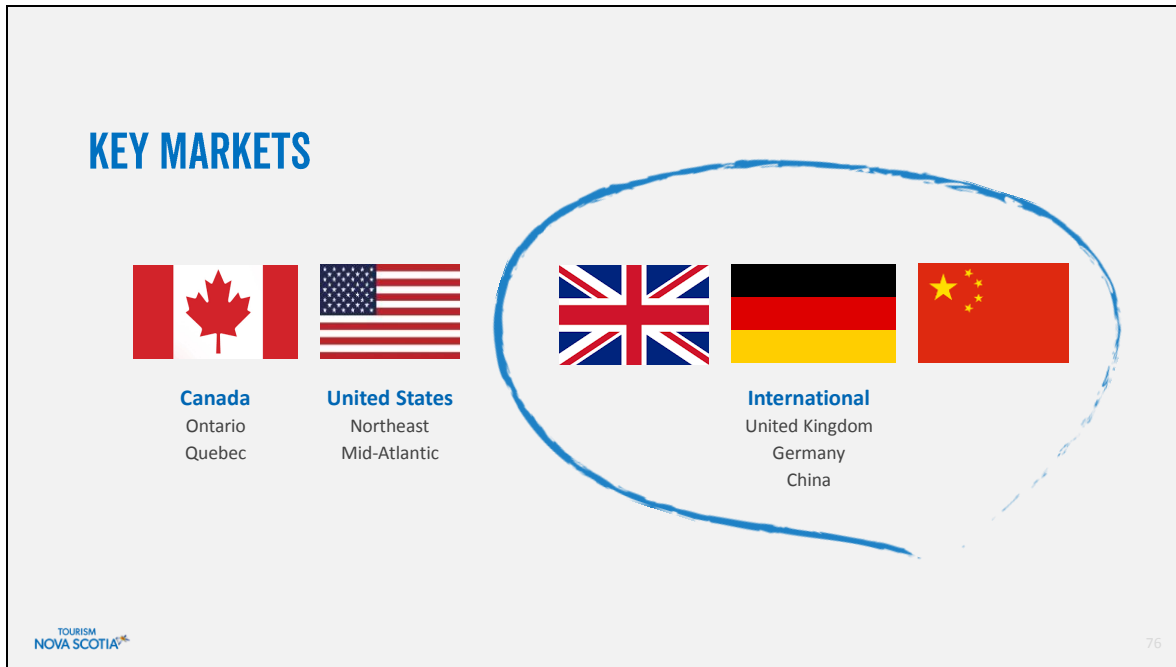
The Nova Scotia video we created as a tool for our sales team to showcase Nova Scotia to the rest of the world also produced amazing results in social media. The video reached nearly 1.15 million people organically with nearly 900,000 views. When we saw how much our audience loved it, we boosted it to our target markets to reach 500,000 more people.



We'd like to thank you for continuing to help us produce great content and for contributing to the social conversation by using our hashtag #VisitNovaScotia. We're now at 173,000 posts on Instagram!



While NovaScotia.com remains our main platform to show potential visitors what they can see and do in Nova Scotia, we're also aware that travellers look in other places for inspiration and information. Bringing Nova Scotia stories and experiences to life on popular content sites where travellers hang out online is a key priority for Tourism Nova Scotia.



When you read our strategic plan, you’ll learn that our strategy in overseas markets is all about partnering to raise the profile of Nova Scotia. We partner on marketing initiatives with the other Atlantic provinces through the Atlantic Canada Agreement on Tourism, as well as with Canada’s tourism marketing agency, Destination Canada.

This year, we became a gold level participant in Destination Canada’s partnership programs, putting us in the same category as Ontario, Quebec, Alberta and British Columbia: the big guys. Through this partnership, we leveraged Canada’s brand and the over \$44 million dollars Destination Canada invests to market Canada in the United States, United Kingdom, Germany and China year-round. Our work with Destination Canada saw influencers from major content hubs like National Geographic, The New Yorker, and The Guardian bring great stories about Nova Scotia to life.

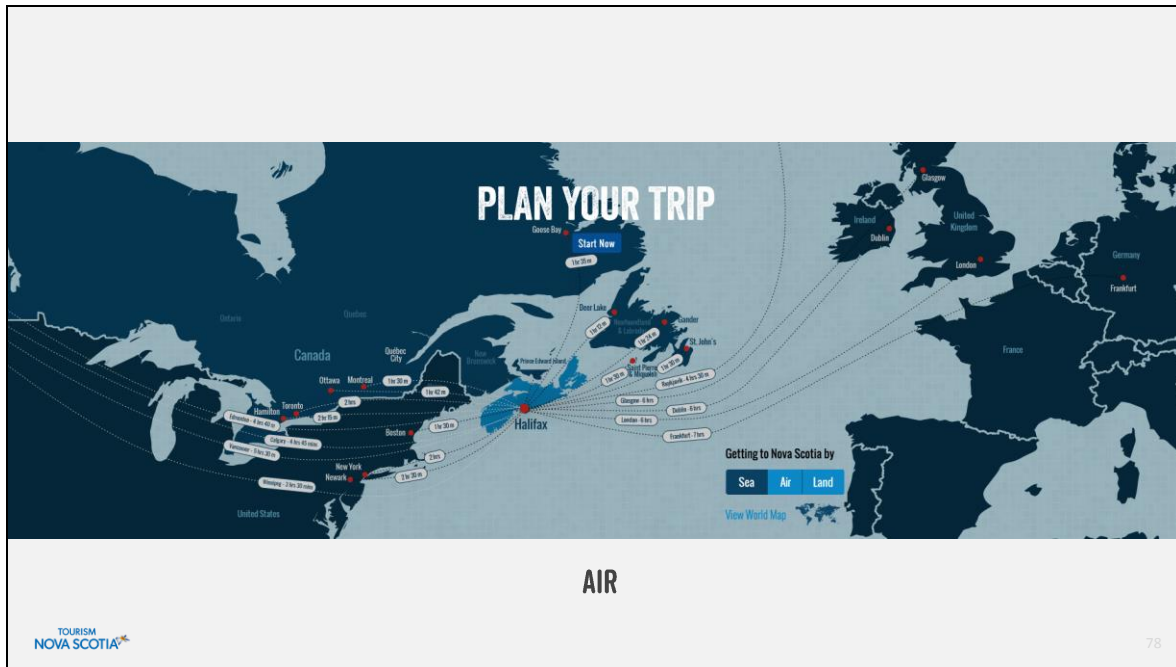
Our strategy in costly, further away markets, is to also work with in-market representatives who have established relationships with tour operators, travel agents and travel media and influencers. We have representatives in the UK, Germany and—very soon—in China

TRADE SHOWS & MISSIONS

- American Bus Association Marketplace: January 2017
- Icelandair Mid-Atlantic Marketplace: **January 2017**
- National Tour Association Marketplace: February 2017
- Internationale Tourismus-Börse Berlin: March 2017
- Rendez-Vous Canada: May 2017
- UK Sales Mission: July 2017
- Showcase Asia: October 2017
- World Travel Market: November 2017
- Germany Sales Mission: December 2017



Since the beginning of the year, we've hosted 40 international travel trade professionals on familiarization tours of Nova Scotia, and we've had 400 business-to-business appointments while attending these trade shows and sales missions.



All travellers are important, but Tourism Nova Scotia’s strategy is to attract higher-spending visitors from farther away markets. The further they travel the more likely they are to stay longer and spend more. One of the keys to getting these visitors is air access. There is a correlation between direct air routes and visitation because travellers are more likely to pick a destination if it is easy to get there. Recognizing this, we continue to work with government, our partners at the Halifax Stanfield International Airport, and airlines to develop, market and maintain air routes from our priority markets.



2017 was our first big year in the China market and our strategy was to partner with Destination Canada to help raise the profile of Nova Scotia with tour operators who are already selling Canada.

玩转新斯科舍省
EXPLORE NOVA SCOTIA

佩姬湾-观鲸

在哈利法克斯的南部的佩姬湾 (Peggy's Cove), 有一座红白相间的灯塔在蔚蓝大海和天空的衬托下, 于起伏的花岗岩海湾, 静静的伫立着, 散发着梦幻般的气息, 成为这个海滨上一道特有的风景。如果你来到这里, 除了在海边裸露的岩石上欢快的奔跑, 还可以划皮划艇出海探索美丽的风景, 运气好的话还能邂逅一两只浮上水面的鲸鱼。畅游在这种美景中, 猜想有什么不开心的事情都可以抛诸脑后吧!

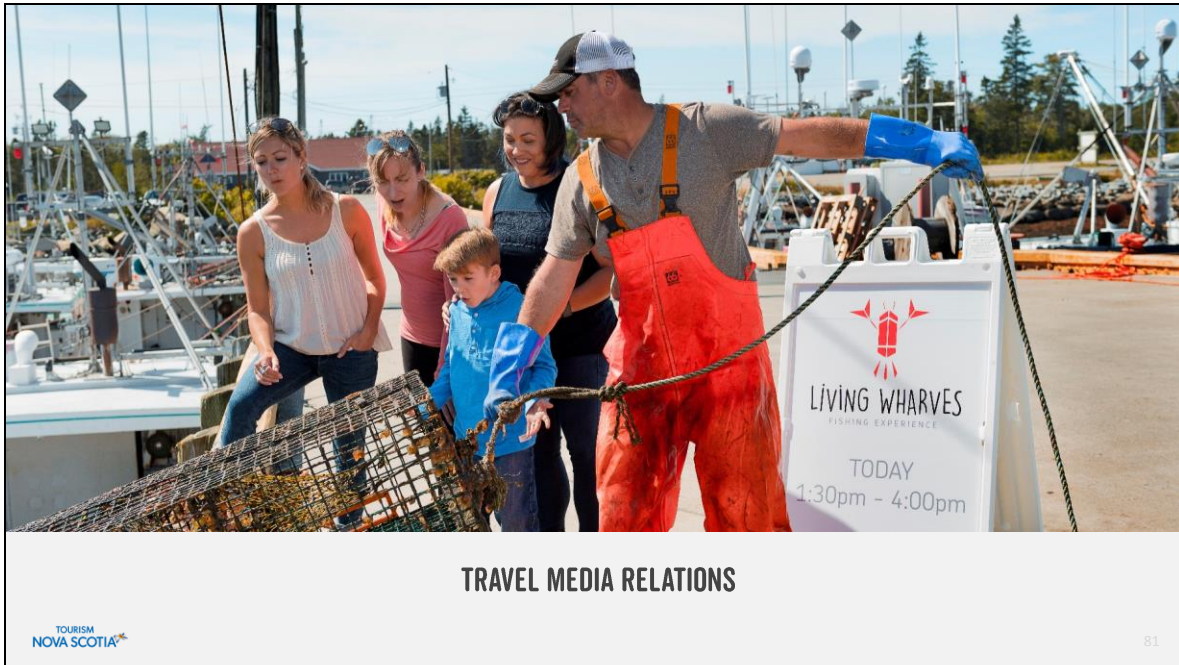
CHINA

TOURISM
NOVA SCOTIA

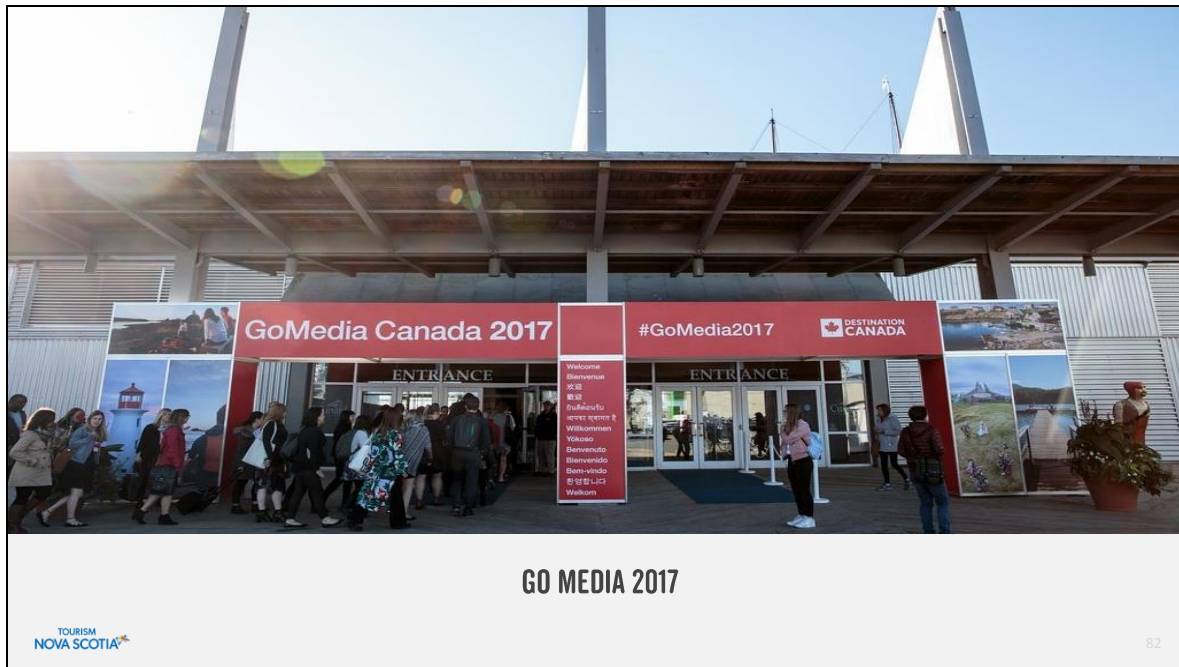
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We also had marketing partnerships with two of China’s leading online travel agents, both of which are now selling our province. Nova Scotia has a competitive advantage when it comes to attracting Chinese visitors because of our amazing seafood, wine and culinary experiences, pristine nature and soft adventure experiences. Our focus going forward will be to give Chinese visitors more reasons to choose Nova Scotia over other Canadian destinations by working with you to create more experiences that appeal to these high-yield travellers.

2018 has been designated the Canada-China Year of Tourism, so it’s fitting that we’ll be increasing our activity in China next year by hiring an in-market representative to help us boost awareness and sell more Nova Scotia holidays. We thank the provincial government for providing us with an additional half a million dollars this year to expand our efforts in the China market. We look forward to aligning with the province’s strategy to build mutually beneficial trade, investment, and political and cultural relationships with China.



Another way we boost awareness of Nova Scotia in key markets is by working with travel media and influencers.



Just last month, Nova Scotia hosted Destination Canada’s largest travel media event, GoMedia Canada, welcoming travel media professionals from around the world to network, do business, and discover what makes Canada—and this year Nova Scotia—worth visiting. As this year’s host, we had the unique opportunity to showcase our province to both media from around the world and industry partners from across Canada. And it’s already paying off in spades as this year’s delegates called it the best GoMedia ever!



The team worked hard to ensure GoMedia delegates had the opportunity to experience different aspects of the area: from exclusive tours of the Bluenose II to day tours in and around Halifax to a traditional lobster dinner at a vineyard in the Annapolis Valley. We also hosted 20 media guests on our pre- and post-familiarization tours throughout the province. Calgary is the host city for 2018 and they are already scratching their heads, asking themselves, “How do we top what Nova Scotia did?”

MEDIA RELATIONS HIGHLIGHTS

- Attended **3** international marketplaces / tradeshows with over **85** one-on-one meetings
- Hosted **67** media and influencers throughout the year
- Hosted **392 delegates** at Go Media, including **119 media**
- Circulation: **+500 million**
- Media value: **\$16.7 million**



In addition to hosting GoMedia, we continued to work with other travel media and influencers. They are viewed by a wide audience as being trusted advisors for travel, and in most cases it's their stories, content, photos, and videos that inspire visitors to pack their bags and visit Nova Scotia. This year, we hosted 67 media and influencers on familiarization tours around the province—most with individual customized itineraries to meet their particular interests and to experience our wide variety of compelling stories.

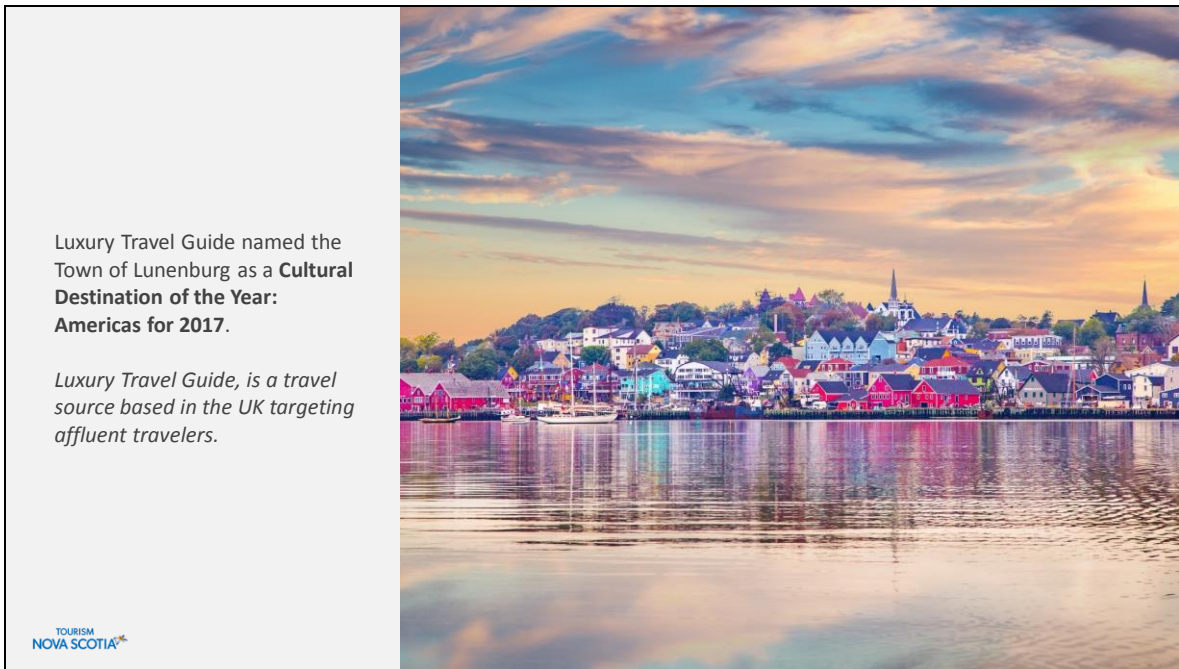


Conde Nast Traveler included The Cabot Trail as one of **“The Best East Coast Road Trips”**.

Conde Nast Traveler online receives more than 5.3 million unique visitors per month.



Accolades come to us on a steady basis. This year, we made several “top” lists including one of the best East Coast road trips.



Lunenburg was selected as a preferred cultural destination.



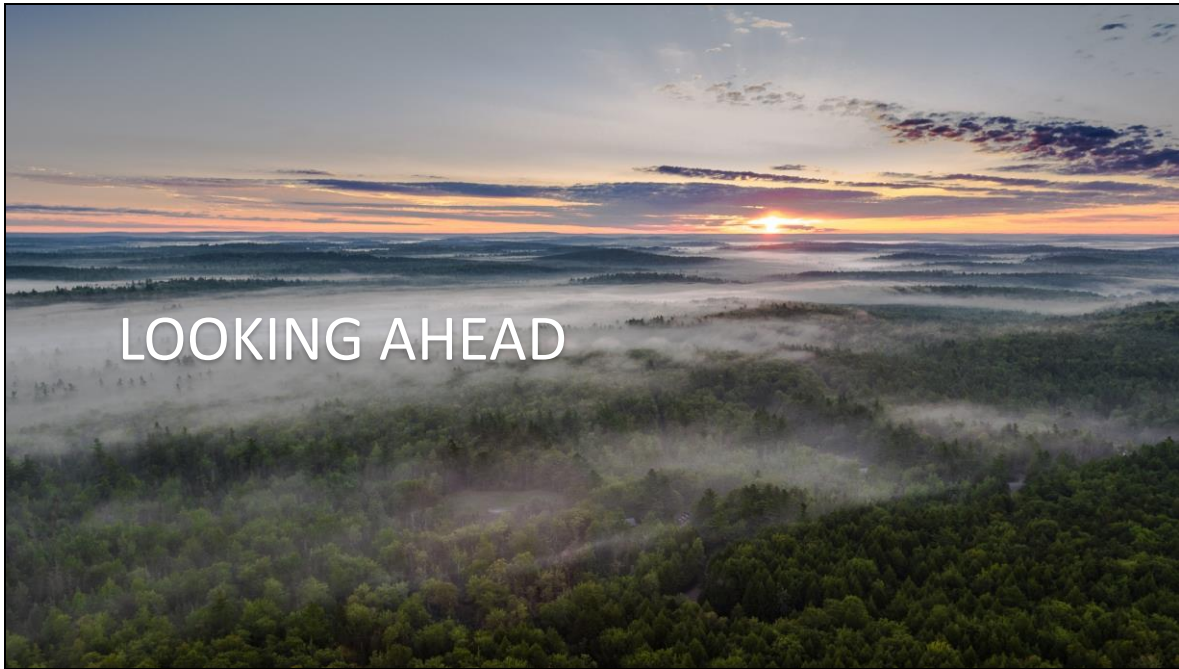
Conde Nast Traveler ranked Halifax as one of the **Top 15 Friendliest Cities in the World** in 2017.

Conde Nast Traveler online receives more than 5.3 million unique visitors per month.

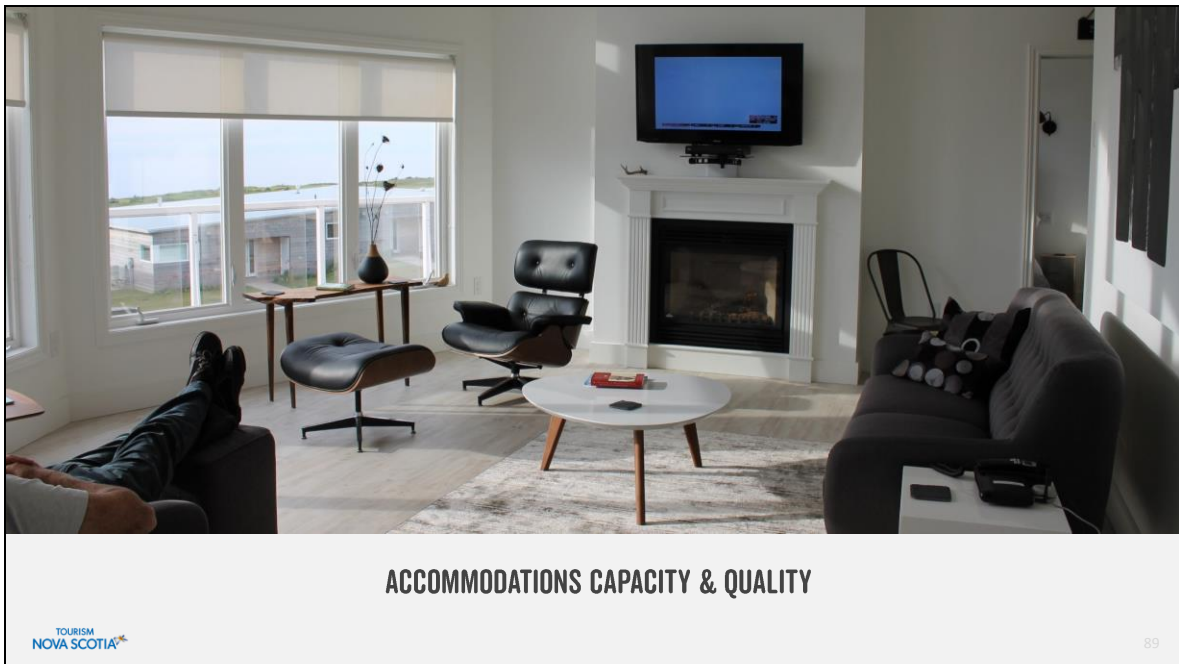
TOURISM
NOVA SCOTIA

And Halifax ranked as one of the friendliest cities in the world.

Thank you to everyone involved in creating positive experiences for our guests. One thing is for sure, Nova Scotians know how to leave a wonderful, lasting impression.



And so, as you can see, 2017 has been a remarkable year. Visitation is up, we've made great progress against our goal, and there is a strong sense of optimism about the future. As part of budget proceedings this year, the provincial government announced it will invest \$8 million over four years to revitalize iconic tourism sites that provide tourism operators with the platform to deliver world class experiences. The Department of Business and Tourism Nova Scotia are currently developing criteria and program guidelines. Watch for more information on this new program in the new year.



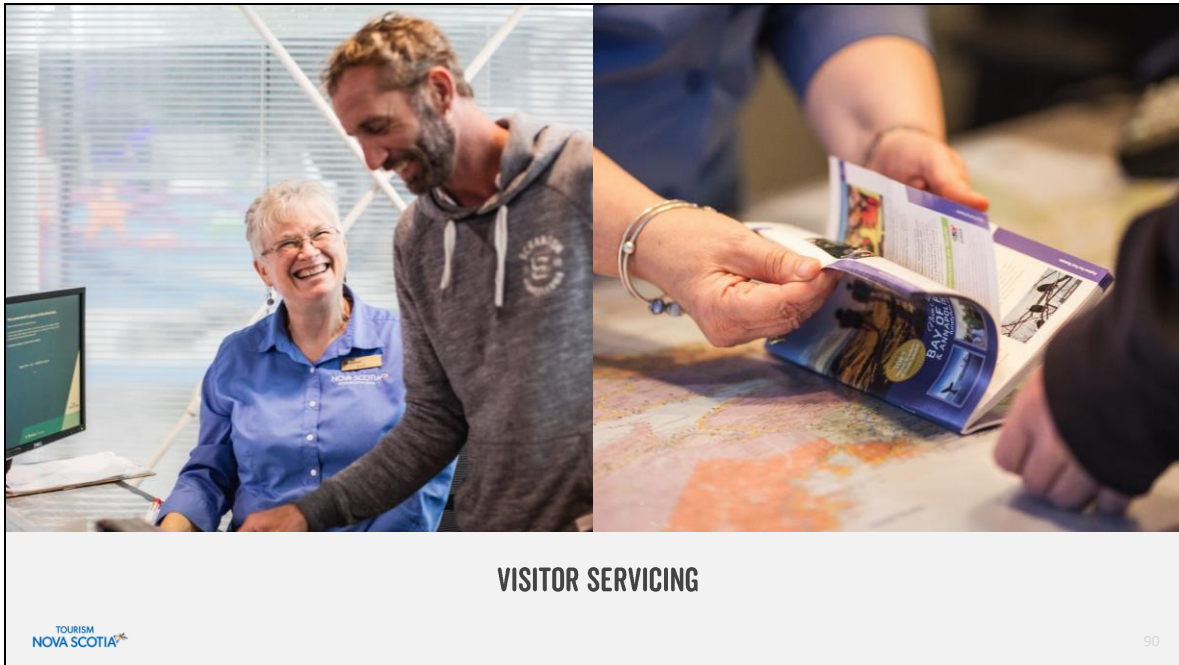
ACCOMMODATIONS CAPACITY & QUALITY

TOURISM
NOVA SCOTIA

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This year, we hired a consultant to complete a Tourism Accommodations Needs Assessment for Nova Scotia. The report shows that to reach the \$4 billion-dollar goal, we must increase room capacity and overall quality. Leveraging short-term rental platforms like Airbnb is just one way we can expand and contract supply easily and affordably—especially in rural areas or when special events are happening. The lack of accommodations during the summer months is particularly high in areas outside the Halifax region and we must address this.

Tourism Nova Scotia will use the results of the Accommodations Needs Assessment to inform future decision-making. Copies of the report can be requested through our website, tourismns.ca. If we're going to reach \$4 billion by 2024, we must innovate, think big picture, and try new things.



Tourism Nova Scotia will continue to operate visitor information centres at key entry points and iconic locations throughout the province with a view to delivering visitor services in a way that supports revenue growth. The following video highlights a pilot initiative between our Waterfront Visitor Information Centre, Waterfront Development Limited, and Taste of Nova Scotia this past summer. We look forward to building on this partnership in 2018.



Taste of Nova Scotia Visitor Servicing Partnership video: <https://youtu.be/DSpwWQSDMT0>



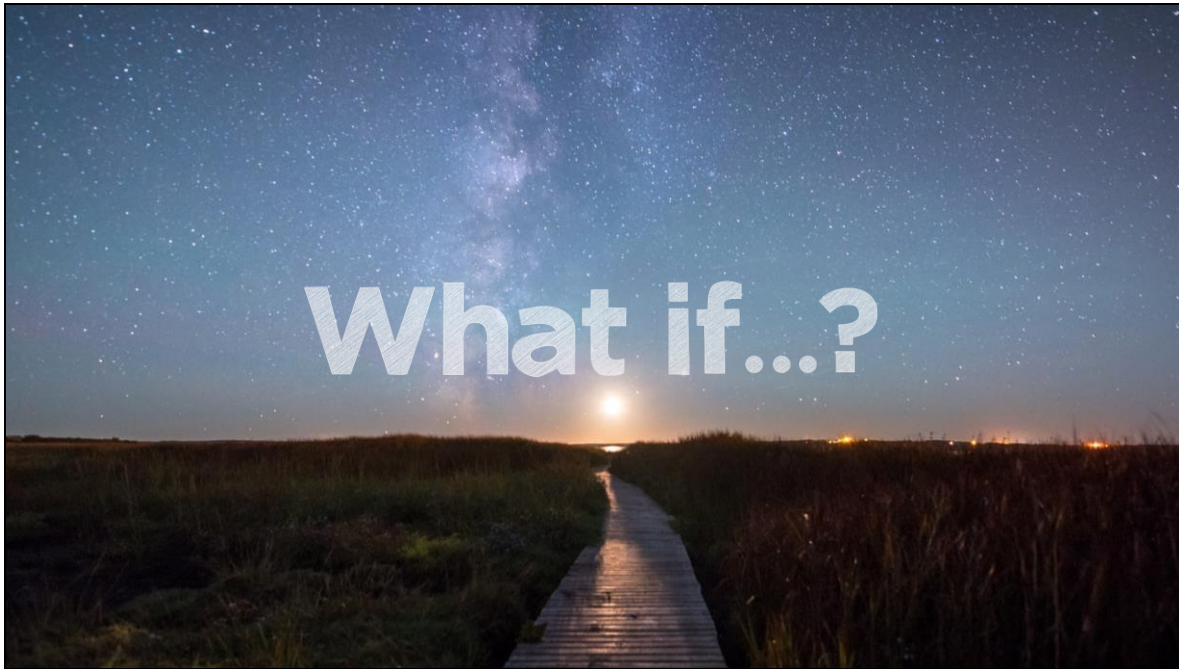
Next spring, Nova Scotia will host Destination Canada's largest international travel trade marketplace, Rendez-vous Canada (RVC), from May 13-16, 2018 at the new Halifax Convention Centre. Over 1,800 tourism leaders, including 500 tour operators and travel agents from over 20 countries, will descend upon Halifax for meetings and a first-hand account of Nova Scotia.

Nova Scotia participants will have the opportunity to build relationships with key international buyers, while learning more about the kinds of tourism experiences, products and services that are in demand around the world. RVC is expected to immediately generate \$5.5 million in economic impact for the province. Other longer-term benefits include increased awareness and sale of Nova Scotia holidays to travelers around the world.

There is no question, the future is bright for Tourism in Canada and Nova Scotia. We're making progress against our goal, but we've got a lot more to accomplish.



“What If...?” video: <https://youtu.be/41MkvolFFMg>



One of the people I have greatly admired over my years in the industry is the former President and CEO of Tourism Vancouver, Rick Antonson. He speaks a lot on the topic of cathedral thinking, which is all about starting something you may never see finished for the benefit of future generations, just like the great artists and architects from centuries ago envisioned epic cathedrals and churches that we all enjoy touring today, but they never saw finished themselves.

It's about the long term.

It's about shared ambition and doing meaningful things that will have a lasting impact. Rick Antonson believes everyone should be involved in unfinished work. In the spirit of cathedral thinking, I encourage you to consider what you can do as an individual or in your organization to positively impact our industry, our people, and our economy in the long term.

What if we always analyzed opportunities through a research-based business lens?

What if we always put the interests of the visitor—what they want—first?

What if the rest of the country looked to Nova Scotia as the best-practice tourism destination?

Let's be leaders, let's be change agents, and let's explore all the possibilities through the lens of "What if...?"