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Tourism is the main economic driver in many Nova Scotia communities, and yet there is so much more potential we can achieve.

We will do that by working closely with our industry partners, including tourism operators, businesses and associations, to grow the industry, enhance our tourism infrastructure, and seek out and reach new markets. Together, we can achieve more success in the tourism industry and be a shining example of how to bring 21st century solutions to 21st century challenges.

The Nova Scotia Tourism Agency is developing new and exciting partnerships that see industry and government collaborating to achieve new levels of growth and success in Nova Scotia tourism.

More than a thousand industry stakeholders contributed to the development of the tourism strategy – working together, we are now implementing the strategy and seeing some promising results.

The strategy’s overall goal remains unchanged. We need to bring more visitors to Nova Scotia and inspire them to stay longer and spend more money. That means more profitability for a $2 billion industry that supports more than 24,000 jobs throughout the province.

We are all excited about the work to be done and the challenges that lie ahead. Together, we will work to bring the world to Nova Scotia, attract more visitors, and promote all that our beautiful, vibrant, diverse and friendly province has to offer.

As the newly appointed Minister of Economic and Rural Development and Tourism, I look forward to meeting all of you over the coming months to learn more about how we can innovate and grow Nova Scotia’s tourism industry together.

Yours very truly,

Michel Samson
Minister, Economic and Rural Development and Tourism
Message from the Board Chair

I am privileged to work on your behalf as the new board chair for the Nova Scotia Tourism Agency.

Tourism is extremely important to Nova Scotia’s growth and prosperity. In fact, as outlined in the Ivany Report, it is one of our foundational rural industries. It is currently a $2 billion industry, supporting thousands of jobs in every region of the province. As board members, we take that responsibility very seriously.

Over the past year, we have been working closely with CEO, Pat Sullivan, staff at the NSTA, and the TIANS board to begin implementing a new strategy for tourism. We are committed to making significant changes in the way we do business in order to fuel economic growth for the benefit of all Nova Scotians.

With the decrease in the Canadian dollar, a recovering US economy, and positive signs in key markets, we are optimistic that the timing is right to implement strategic changes that will bring more visitors to Nova Scotia and grow our tourism revenues.

To do that, we need all of our industry partners on board. We need you. Together, we will make the tough decisions and the necessary improvements to create positive, lasting growth.

As you read this inaugural NSTA annual report, I hope you will consider what you can do to support the strategy.

Sincerely,

Ben Cowan-Dewar
Board Chair, Nova Scotia Tourism Agency
Message from the CEO

Since the NSTA was established in September 2012, we have been continuing to align our team, programs and services with our industry mandate – to attract more visitors to Nova Scotia.

We launched the tourism strategy in May 2013. Since then, we have been identifying, developing and marketing our tourism icons to inspire potential visitors, and working closely with industry to encourage visitors to stop and experience the ‘places in between’ throughout the province.

We know that to reach our strategic goals, we need to continue to ask ourselves how we can innovate to achieve different results. The recent publication of the Ivany Report offers a great starting point for discussion.

In 2013, we addressed some of the less complex questions posed in the early days of the agency. Now, as we move forward, we need to tackle some of the tougher issues, such as developing a unified, province-wide approach to signage and how to effectively allocate funds for partnerships, VICs, and festivals and events to align with our strategy.

We know the decline in visitation isn’t just a Nova Scotia problem. Visits to Canada are also down significantly over the past decade. There isn’t one magic solution that will change a 10-year decline overnight. What we have in our favour is a new agency, one that is taking a more strategic, collaborative, consistent approach to tourism in Nova Scotia, and agreement between the NSTA and industry that change is required.

We have been given a task – to bring more visitors to Nova Scotia – and we are on the right track to do that. However, we know we can’t do it alone. We need your support so we can execute the plan and move forward together.

In the first year, we have been working hard to stabilize the industry. We need to be able to put our plan into action consistently for the next few years to make a difference and achieve the results we are all looking for.

Sincerely,

Patrick Sullivan
CEO, Nova Scotia Tourism Agency
At the NSTA, we collaborate with industry to promote all the amazing products and experiences Nova Scotia has to offer.
About the NSTA

In Nova Scotia, tourism is a key source of pride, helping to support our families and local economies, and to build communities throughout the province.

The NSTA is a special operating agency (SOA) – an organization with increased management flexibility to improve performance. The CEO leads the agency, with the support of an industry advisory board, to be more entrepreneurial, to respond to strategic opportunities, and, ultimately, to grow visitation to Nova Scotia. As an SOA, we report to government through the Minister of Economic and Rural Development and Tourism.

Since the launch of the agency, the NSTA has been going through a period of transition, including a move to Windsor, Nova Scotia, and the loss of some staff. During this time, we have been rebuilding our team, adding 12 new members to an amazing core group of staff from the Tourism Division, who provide continuity and a valuable knowledge base. At this time, there are still a few vacancies to fill, but we are excited about the great balance we are achieving – a staff with experience and great depth of knowledge, matched with high energy and fresh ideas.

Together, we are building a strong team, poised to face challenges head-on and seize strategic opportunities as they arise.

We are focused on research, marketing, sales, media relations, partnerships, and product development. In April 2014, we welcomed staff from ERDT, who will support the NSTA in visitor services and quality assurance.

At the NSTA, we collaborate with industry to promote all the amazing products and experiences Nova Scotia has to offer in our key markets (Canada, the Northeastern United States, Germany and the United Kingdom). The agency’s strategic goal is to bring more first-time visitors to Nova Scotia – encouraging them to stay longer and spend more.
If the role of the NSTA is to bring more visitors to Nova Scotia, the role of industry is to bring them back.

+ 39%
web and mobile visits from Ontario and Quebec during 2013 peak season
Executive Summary

As we look back on 2013, a number of important elements have come to the fore, forming the backbone of our strategy in its first year.

At the NSTA, we are focused on working with our industry partners to grow Nova Scotia’s tourism industry. Only by establishing clearly identified roles, and eliminating duplication, can we focus our energy to make the greatest impact in achieving our strategic priorities.

The role of the NSTA is to bring more first-time visitors to Nova Scotia. In our partnerships, in our programs, in our services, in everything we do, we first ask ourselves if it will bring more first-time visitors to Nova Scotia.

If the role of the NSTA is to bring more visitors to Nova Scotia, the role of industry is to bring them back, to ensure these visitors have memorable experiences that compel them to return. Industry has a huge opportunity to influence visitors’ decisions.

We need the support of our industry – its full commitment – to make a real, tangible difference.

A great example of partnership in action in 2013 was Louisbourg300. This event was a true collaboration – a community-based initiative in which all partners came together to leverage Nova Scotia’s marketing strength and commit to make the anniversary a success.

The results:

- Visits to Louisbourg up 36% over 2012 – largely first-time visitors
- Accommodations in Cape Breton up 5% – first increase in 7 years

If we can continue to come together like this in all our initiatives, at the highest level of engagement, the possibilities are endless.

Our increased, focused spend in Ontario, and new funds in Quebec, have led to significant visitor increases. For example, in August – our busiest month – Ontario road travel was up 20% and Quebec road traffic was up by 18%.

It has also led to impressive increases in our inquiries and digital results – while the campaign was in market, web and mobile visits from Ontario and Quebec were up 39%, and literature requests were up 12%.

We are making a difference, but it is not only about making sure we are spending in the markets with the best potential for growth.

There are a number of things that, implemented together, will allow us to move the mark. And these aren’t necessarily new things. Through evidence-based decision making, we are identifying and capitalizing on what works.

We’ve been implementing these initiatives for just one season. Only by executing them effectively over a sustained period of time will we see true, lasting results.

These elements – clear roles and responsibilities, collaboration, strategic spending and consistency – will continue to guide the NSTA as we move forward.
We need to be nimble and position our assets to attract these new visitors, while continuing to focus on our major markets.
Year in Review

Global outlook

We know that the global travel market continues to grow by 3% to 4% each year, and if we don’t have a good share of that growth, our industry will continue to decline.

Just 6% of the population was travelling in 1980, and the World Tourism Organization estimates that by 2020, 18% of the population will be travelling. This presents both a challenge and an opportunity. Competition for these travellers is fierce.

To cite a recently published Deloitte Canada report, in 1970 Canada was the world’s second most popular destination, behind Italy. It is now at 18, trailing countries such as Ukraine and Saudi Arabia.

According to the report, the loss – caused by the high dollar, fewer US visitors and greater global competition – is costing Canada billions in export dollars from foreign tourism. This is not just a Nova Scotian problem; it’s a Canadian problem. However, increased global travel also presents a great opportunity for us to market ourselves to these new world travellers.

The industry is changing dramatically. We know emerging destinations are feeding the growth of global travel, growing at twice the pace of North America and Europe.

In a few years, the people living in these quickly developing countries will have the means and desire to explore long-haul destinations, including North America. When they begin to travel to Canada and the US, we want to be ready to welcome these visitors.

We need to be nimble and position our assets to attract these new visitors, while continuing to focus on our major markets.

We know that the Ivany Report has identified tourism as a key entry point for potential immigrants. Through initiatives with the Atlantic Canada Tourism Partnership (ACTP) and the Canadian Tourism Commission (CTC), we are exploring and monitoring ways to appeal to emerging markets that offer real potential for growth, but these are still early days for Nova Scotia in these markets.

Canada

Moving closer to home, we know the industry in Canada has been struggling for the past 10 years, but 2013 has seen some increases.

- total overnight visits to Canada +1%
- US visits +1%
- overseas visits +3%

The concern is the increasing number of Canadians visiting the US – up 3% in 2013. We know that Canadians make up 88% of visitors to Nova Scotia, and we are in direct competition with the US for those dollars. Brand USA is spending $200 million a year on advertising to Americans and Canadians.

From a Nova Scotian perspective, we are very conscious of the changing Canadian market, and the need to adapt to the new visitor in order to compete.

Pollster, Darrell Bricker has noted that as the population of Canada changes through increased immigration, power is now shared by two groups: Western Canadians and new-Canadian, middle-class residents of the Greater Toronto Area (GTA). New Canadians are mostly arriving from South Asia or the Philippines, and are unlikely to have experienced Canadian outdoor activities.

We currently advertise in the GTA, but it’s clear we can no longer count on the traditional demographic we have been catering to for years. We need to be aware of the changing Canadian population and what it means for us going forward.

The basis for attracting these potential visitors, and the foundation of the strategy, is to make the strategic, evidence-based decisions that will allow us to reach our goals.

It’s all about the research and the data.
Peak season results - June to September 2013

In the peak season, we saw some bright spots as a result of the *Take yourself there* marketing campaign.

We know that 50% of our leisure visitors are arriving between June and September. That is where we are focused on achieving significant results. If we are able to increase visitors during the peak season, we know it will likely have a ripple effect during the rest of the year.
Year in Review CONTINUED

Nova Scotia
The data we gather provides great insight into whether our marketing efforts are making an impact.

Our national advertising campaign runs March to June – seeking to compel travellers to come during the peak travel months, from June to September – when we know 50% of our leisure visitors are arriving. That is where we are focused on achieving significant results. If we are able to increase visitors during the peak season, we know it will likely have a ripple effect during the rest of the year.

To be clear, we aren’t ignoring the rest of the year. We are working to increase those visitors through meetings and conventions, major events, and other initiatives through our strategic partnerships. However, we know June to September is the critical time period – when we can really make the greatest impact.

2013 results
Methodological changes have occurred for data collection at Tidnish, Digby and Caribou entry points. Data will be reported when available.

It will take time to recover from the ten-year decline we’ve experienced. While the 2013 results for Nova Scotia haven’t been as positive as we’d like, we have seen some bright spots due to our marketing efforts in Ontario and Quebec.

Number of visitors
Nova Scotia welcomed an estimated 1.9 million overnight visitors in 2013, down 3% compared to 2012.

While spring results declined this year, results during the peak season were stable. October and November saw some improvement, and December saw a significant decline due to more storm days and other factors.

Visits by air were down 6% year-to-date, partly due to aircraft moving from Nova Scotian to Western Canadian routes.

For much of 2013, Nova Scotia saw a reduction in both number of flights and the size of some of the airplanes used. This is a national trend affecting overall air capacity to Canada and visitation from international destinations. Air traffic at Halifax Airport was down 1% last year.

Arrivals at Amherst and North Sydney were down 2%.

Visitors from Canada were down 3%; visitors from overseas markets and the United States were both down 2%. In 2013, visitors from our key markets in the UK and Germany were up 7% and 11% respectively.

Accommodations activity
Total room nights sold in the province were stable in 2013 at an estimated 2.4 million room nights sold. Results in Metro Halifax were down 2%, though we saw significant growth in the South Shore (+6%) and Cape Breton (+5%) regions.

Additional visitor statistics
Campground activity (May-September) showed an increase in total nights sold (+17%). The short-term nights sold were down 3%. Out-of-province tourists are more likely to be represented by short-term nights.

2013 overall results
- total visits -3%
- air traffic -6%
- road travel -2%
- room nights sold on par

Peak season results
(June to September)

Number of visitors
There were some bright spots during the peak tourism season in 2013 due to the Take yourself there marketing campaign in Ontario and Quebec.

Our overall visitation from June to September was on par with 2012. Visitors from Quebec were up 1% and visitors from Ontario were up 3% over the same time period in 2012. Road travellers from Ontario were up 12% and road traffic from Quebec in the same period was up 2%.

From June to September, we welcomed 28% (approximately 3000) more visitors from the UK than last year; results from Germany were on par with 2012.

Accommodations activity
During the peak season, accommodation nights sold across the province were down 1%, boosted by good results in the South Shore (+8%), the Yarmouth & Acadian Shores region (+1%), and the Cape Breton region (+6%).

These are some of the bright spots we will build on as we move forward. In addition to our key indicators, we are also closely monitoring our results against the goals outlined in the strategy.
During the peak season, room nights sold outside of Halifax were up 3%.
Tourism Strategy

Industry and government are working together through the NSTA to implement the five-year strategy for tourism to tap into the unrealized visitor potential. It is taking a more business-like approach to tourism to build a more profitable, vibrant industry that delivers opportunities for greater prosperity across Nova Scotia.

Strategic Pillars

We are working to achieve our strategic goals through five strategic pillars. The following pages show our progress against each pillar in 2013.

1. Leadership and collaboration
2. Evidence-based decision making
3. Higher-quality products and experiences
4. Access to Nova Scotia and throughout the province
5. Inspirational, strategic marketing
Halifax, Lunenburg and Cape Breton make National Geographic ‘50 Places of a Lifetime: Canada’
Strategic goals

The three overall targets are:

1. Increase total overnight visitors 1% per year.
   2013 results:
   • total visits from January to December down 3%.
   • from June to September, when most accommodations and operators are open, total visits were on par.

2. Increase non-resident revenues by 4% annually.
   • We are currently collecting data for 2011 revenues, and expect to have 2012 revenues by the end of 2014.

3. At minimum, maintain room nights sold outside Halifax at 2012 levels.
   2013 results:
   • total room nights sold across the province in 2013 are on par; room nights sold outside Halifax are up 2%.
   • from June to September, room nights sold across the province outside of Halifax are up 3%.

In Halifax Metro, we’ve seen a 4% decrease in room nights sold during the summer season. We want to – at least – maintain room nights sold in the critical metro area – which makes up about 50% of room nights sold in the province.

We need to stabilize these numbers and turn them around in a meaningful way, and begin to address other concerns, such as occupancy rates. We know we have capacity to sell more rooms, especially during the peak season, to build healthier, more vibrant tourism businesses.

Room nights sold by region – June to September 2013
Leadership and collaboration

*Build pride among Nova Scotians in what the province offers visitors; enhance Nova Scotians’ awareness of their role as hosts and ambassadors, and their appreciation of the value of the visitor economy.*

Leadership and collaboration marks our opportunity to shift the mindset of the province to a more visitor-focused approach.

In 2013, we’ve been setting benchmarks on our industry engagement to improve our collaboration and further define roles and responsibilities. We have developed new communications tools, such as the inTouch blog and the NSTA website, to engage industry and make our information, programs and services more accessible to operators and stakeholders.

**NSTA website**

The NSTA website – novascotiaturismagency.ca – has now been up and running since June 2013. All the information previously accessed through the Tourism Partnerships and Programs guide is now available and regularly updated online, along with much more.

The inTouch newsletter is now a blog, which has allowed us to be much more timely and consistent in the way we share information. About 3000 subscribers receive the newsletter, up from our previous iteration, which was sent to about 1300 readers. Since its launch, the open rate has been good, averaging at about 38% - but we want to do even better.

**Some of our most popular stories in 2013:**

- New Photo Opportunity on novascotia.com
- Nova Star Shares Details on New Ferry
- Excitement Builds for Portland-Yarmouth ferry
- Fall Promo Opportunity
- August Stats Available
- NSTA Board Appointments
- 2014 Marketing Campaign
- Festival and Events Listing Deadline

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**novascotiaturismagency.ca results:**

- More than 25,000 visits to site
- 13,370 unique visitors
- 82,000 page views
The NSTA is currently exploring social media channels for the best way to connect with industry. We’ll continue to fine-tune and implement our industry communications plan in 2014. Please stay tuned for more details through *inTouch* by subscribing at [www.novascotiaturismagency.ca/intouch](http://www.novascotiaturismagency.ca/intouch).

Staff are also in the process of aligning our visitor information centres with the tourism strategy, reviewing our resources and exploring options for the best return on investment. Building on the results of our recent customer service audit, provincial VIC staff will receive sales-focused training, ensuring they have the skills and tools to encourage visitors to stay longer and spend more.

We are focused on increasing the efficiency of our marketing partnerships, working with partners, such as TIANS and the regional tourism industry associations (RTIAs), to continue to clarify roles and responsibilities and generate the best possible return on investment.

**What industry can do**

While we have outlined the key initiatives the NSTA is implementing to support the strategy, industry also has a big role to play.

We want industry to build relationships with our visitors – to understand what motivates and inspires them – not only responding to their needs, but anticipating their needs, and exceeding their expectations.

We also want industry to work with their RTIAs. As in the Louisbourg300 example, partnership is the key to success. Working together, we can learn from one another and build something greater than the sum of its parts.

We want to collaborate to do things better – to build a constructive dialogue around how we work together as partners.

We’ll continue what’s working well, and discontinue what no longer works. With only so many dollars available, we need to think about how those dollars are spent for the best return on investment.
In 2013, we experienced some challenges due to a serious lack of research resources and staff. We are currently in the process of rebuilding our team to ensure industry operators are getting the information they need to grow their businesses.

We know that while our methodology is solid, continuous improvement is crucial to attain the best data. Collectively, we need to do better.

At the NSTA, we are starting with timely, consistent reporting. This year, we faced some challenges as a result of cutbacks in enumerators at ferry-crossing entry points. We are now working with our ferry partners to incorporate their information into our systems.

Since last fall, we have committed to posting monthly results on the NSTA website – six weeks after the end of the reporting period.

We will soon begin reporting on new visitors to Nova Scotia to measure annual results against our strategic goals. Another new way we are measuring impact is through the brand health index – a study to help us evaluate the ongoing impact of the Take yourself there marketing campaign.

The index is helping to benchmark the perceptions of outdoor enthusiasts in Ontario, Quebec and the US, who have never visited Nova Scotia, and evaluate whether those perceptions of the province improve over time as a result of our marketing efforts.
Brand health index

Before developing the new Nova Scotia tourism brand in 2013, qualitative research conducted with potential first-time visitors to Nova Scotia indicated they perceived the province as lacking a sense of vibrancy.

Our new brand positioning helps to shift those perceptions, and the brand health index (BHI) was developed to track this shift. It provides us with a baseline for perceptions of prospective visitors and provides strategic insights as we evaluate our progress and make necessary adjustments in how we communicate our brand.

The index itself is a number that we will use to monitor the health of the brand and its attributes (the pillars: discovery, engagement and freedom). The higher the number compared to the benchmark, the closer perceptions match our brand promise.

The BHI targets outdoor enthusiasts who have not previously visited Nova Scotia. In a first wave survey of potential Ontario and Quebec visitors, conducted before the Take yourself there campaign was in market in spring 2013, the benchmark was measured at 76.0. A second wave conducted following the campaign set a mark of 75.6. This insignificant change was to be expected given that it will take time and consistent effort to change perceptions.

In fall 2013, the survey was conducted to set a benchmark in New England and Mid-Atlantic United States. The benchmark was set at a healthy 74.6.

We will continue to communicate a sense of vibrancy in the brand, and work to decrease the number of people who still believe they need less than a week to experience Nova Scotia. The good news is, Nova Scotia is number two on the list of provinces that these visitors are interested in visiting.

TV has been effective in our promotions. Fifty-three per cent of those surveyed felt the ads made Nova Scotia a more appealing place to visit.

With a comprehensive campaign launching in the Northeastern US in spring 2014, we will be able to chart our progress.

We plan to track changes in perceptions over the next four years in the Ontario, Quebec and US markets.

What industry can do

We are only as good as the information we have – and we need results from all of our operators. We need industry to submit their accommodations reports in a timely way so we can provide all members with the tourism statistics they need.

By monitoring the results and working with our research team, industry operators can identify their own gaps and areas for growth.

Please check the stats on a monthly basis, and contact our staff if you have questions or need advice on how you can benefit from diving deeper into Nova Scotia’s tourism statistics.

Visit www.novascotiatourismagency.ca/research to learn more.

Ingonish and Martinique beaches among ‘Top 10 Beaches in Canada’
vacay.ca
Research tells us that successful tourism destinations focus on promoting their iconic tourism assets.* While our own icons are already well known to us, for a first-time visitor the thrill of driving the Cabot Trail, walking the landscape of Peggy’s Cove, riding the world’s highest tides, discovering our UNESCO World Heritage sites, or walking the Halifax waterfront, is an unforgettable experience.

We need to make sure our iconic tourism assets are accessible, offer value, and create memories that will be shared. This requires the collaboration of government, communities and businesses.

To use an analogy from destination development expert, Roger Brooks, our icons are our anchor tenants in the mall and the numerous communities in between are the individual shops. Our perfect road trips allow us to explore these anchors and compel people to travel the province so they can experience all of the places in between. Through itineraries, road trips, packages and other initiatives, we can highlight the amazing tourism experiences across the province.

This year, we contracted experts to help us define Nova Scotia’s tourism destination icons in the context of our strategy.

For example, we believe Cape Split has major potential to be a premier coastal hiking experience on the Bay of Fundy. We are working with our colleagues at Natural Resources on site development so visitors can experience Cape Split, and we are identifying opportunities for the local community and businesses.

This past year, we also aligned our development funding programs with the tourism strategy to focus on impactful, proactive investments in projects that motivate travel and support our most competitive destinations.

Funding programs
This year, communities such as Antigonish, Lunenburg, and Wolfville received funding under the First Impressions program to enhance wayfinding projects and improve the attractiveness of their communities. Many are implementing recommendations provided by Roger Brooks. Through the new First Impressions program, we brought Roger back to Nova Scotia this year to assess the Eastern Shore, South Shore, and Yarmouth & Acadian Shores. To view these reports, please visit www.novascotiaturismagency.ca/library-tourism-plans.

* Literature Review on Strategically Important Tourism Destinations and Attractions, InterVISTAS

Under our new Competitive Edge funding, we are investing in attractions and sites that provide us with a competitive advantage. For example, we are working with the Municipality of East Hants to provide a better experience for visitors to Burntcoat Head on the Bay of Fundy. On the Celtic Shores Coastal Trail, visitors can now cycle 92 kms between the Canso Causeway and Inverness. We are working with our partners on similar projects from Halifax to Lunenburg, and from Wolfville to Annapolis Royal.

Through these projects, we have elevated existing individual trails under one brand, providing consistent signage and surfaces so we can market them to the outdoor enthusiast.

NSTA staff are working with municipalities, community groups and regional tourism industry associations across the province to improve and better position our product to attract visitors who stay longer and spend more.

Our new development guides for Marketing Your Tourism Business and Community Tourism Planning are now available on the NSTA website at www.novascotiaturismagency.ca/business-development-guides.

Icon development in 2013:
- setting criteria and an evaluation process
- identifying Nova Scotia tourism icons that motivate visitation, are recognized in national and international markets, and differentiate the province
- developing a model to identify, evaluate and validate icons
Professional development

To improve our professional development and build a highly trained workforce, we are committed to industry engagement and education. Our 2013 InnovatioNS Days was a great success. In April, we hosted keynote speakers on marketing, advertising and technology in Truro for free – including experts Terry O’Reilly and Jesse Hirsch.

To support industry development this year, the province also invested in a Total Market Readiness Program for Yarmouth & Acadian Shores, providing 40 industry members with various business and sales skill development opportunities.

Through our Tourism Industry Development program, more than 50 industry members participated in professional development opportunities, such as senior management training through Cornell University, and experiential tourism workshops with Canada’s leading experts.

Halifax convention centre

This year, we participated in discussions related to the Halifax Convention Centre, opening in 2016. We are working with our partners to develop packages and itineraries to support the marketing of the new convention centre well in advance of the grand opening. We need our industry members to do the same.

From a tourism perspective, the new centre will bring thousands of new, first-time, national and international visitors to the province. Our opportunity is to encourage them to stay longer and explore more of Nova Scotia, and to bring their family or friends.

Major events

We are leading a comprehensive approach to events as a means of attracting first-time visitors and delivering measurable return on investment.

Our new events strategy will:

- develop a strategic, dedicated event fund.
- strengthen decision support for investment.
- align investment with government priorities.
- improve coordination among government and industry.
- increase awareness of Nova Scotia through the hosting of events.
- maximize the impacts from hosting.

After a comprehensive industry consultation process, we expect to finalize and implement the events strategy shortly.

Events Nova Scotia was selected as one of only three finalists for Canadian Sport Tourism Organization of the Year in the 2013 Canadian Sport Tourism Alliance Prestige Awards. The award recognizes the organization that best influences sport tourism in its community.

What industry can do

The industry can support the tourism strategy by delivering competitive products and experiences, and even creating new, iconic tourism assets, such as Cabot Links, to bring more visitors to Nova Scotia.

We need industry to develop new packages, experiences, and itineraries to feature in our marketing initiatives.

We encourage operators to work with their local municipality, businesses, event organizers, and associations to bring visitors to their region and make it easy for them to spend. They aren’t competing with their neighbours. The more there is to see and experience in any particular area, the more reason there is to visit. We want them to work together to take calculated risks and get creative about our future.
Improved access to Nova Scotia and throughout the province

In Nova Scotia, we have four ferries – traveling from Yarmouth, Digby, Caribou and North Sydney. As we’ve outlined in the provincial tourism strategy, we’re keen to expand access to the province through all modes of transportation. The Portland to Yarmouth ferry gives us a unique opportunity to compel more valuable first-time visitors from Greater Boston, Maine, and the Mid-Atlantic US to visit Nova Scotia by air, road and sea.

At the NSTA, we’re very excited about the potential the new ferry offers, but we realize it’s not the only answer. We can’t put all our eggs in one basket. We’ve been working with Nova Star Cruises and other partners to expand our reach into the Northeastern US. We will use our resources wisely, with a focus on bringing visitors to the province through a number of modes of transportation, including the new ferry.

Air access

With regard to air access, we are working with our partners, Halifax Gateway Council and the Halifax Stanfield International Airport to increase air capacity.

According to our research, total capacity in our summer season was down 3% last year due to Air Canada moving equipment from Nova Scotia, and this is reflected in our air visitation statistics.

On a brighter note, Condor is increasing capacity from Germany, and Icelandair has also extended its season by three weeks.

Another bright spot for 2014 – beginning in January, Air Canada moved to daily flights to London, three months earlier than usual. Europe Airpost also recently announced the launch of new air routes departing from Halifax Stanfield International Airport to Glasgow and Paris-Charles-de-Gaulle during the 2014 summer season.

We are working with all our partners and airlines, including Air Canada, to improve access – routes, flights and seats – and exploring opportunities to promote Nova Scotia in our key markets.

Cruise

This year in cruise, the Port of Halifax sustained its recent gains, while the Port of Sydney saw significant improvement, with an impressive 15% increase in passengers.

For the first time, we’ve been conducting shore excursion fam tours for major cruise lines, seeking to increase the visitor spend, and compelling passengers to return to Nova Scotia to explore more of the province.

We are also working in partnership to implement a cruise-to-land visitor vacation strategy, and gathering information from passengers to begin building a customer database.

What industry can do

The Industry can support easier access to and throughout Nova Scotia by developing and promoting their high quality product, experiences and packages – working in partnership with the NSTA, Trade Centre Limited, Destination Halifax, Nova Star Cruises and others to put their best foot forward to these potential first-time visitors.

We are also keen to work with industry and our partners to improve signage in Nova Scotia. Operators can help by ensuring their own business signs follow provincial guidelines.
Inspirational, strategic marketing

Effectively communicate the key emotional drivers that will compel target market travellers to visit or explore a visit to Nova Scotia.

Marketing has been the area where we’ve been able to really make a difference and start to move the mark in the first year of the strategy.

We are building our new brand by leveraging our iconic assets through the brand pillars – discovery, engagement and freedom – to reach the first-time visitors we call outdoor enthusiasts, who stay longer and spend more.

Based on the three pillars, the brand embodies the spirit of the perfect road trip. View the 60-second 2013 brand ad at www.youtube.com/user/NovaScotiaTourism.

While we are leveraging Nova Scotia’s iconic assets and destinations – Cape Breton (the Cabot Trail), the Bay of Fundy, Peggy’s Cove, Lunenburg, the Halifax waterfront, the Annapolis Valley, and others – through our TV and print advertising, the breadth of our rich experiences is carried through our compelling content.

In 2013, we also ensured we were in market earlier – the national campaign launched March 18 – to ensure we were reaching travellers when they were considering and planning their holidays. Our marketing in overseas markets – where travel planning starts earlier – began in January.

Last year, there were a number of areas where we experienced success, areas we can capitalize on to create a sustained impact. We increased our spend in Ontario, and re-entered the Quebec market, in English and French, with new funds for the first time in six years. From June to September, we saw a 3% increase in total visitors from Ontario, and a 12% increase in road visitors.

In 2012 in Quebec, we saw a significant decline in visitation. We know our marketing presence made a difference. This year we saw an increase of 1% in total visitors and 2% in road traffic during the peak season.

These results offer promise, especially when you consider other results from the campaign. In Quebec, our campaign had the added content of Louisbourg300, featuring TV, online, print and billboard advertising in English and French.

Television

TV delivers quick awareness and a broad, multi-market reach. Our increased investment in TV last year allowed us to purchase a mix of conventional and specialty network time to maximize our potential reach.

View the 2013 ads online at www.youtube.com/user/NovaScotiaTourism.

Print

Newspapers allow us to effectively reach our target audience, and quite often reach people who are lighter consumers of other traditional media. The travel section offered the perfect environment to engage the reader by combining brand ad messages with customized editorial about Nova Scotia experiences, boosting education and compelling people to choose the province for their next vacation. The newspapers also created special sections on their websites to host the editorial, brand messaging, photography, maps and videos.

Print ads ran nationally and in the Toronto and Montreal markets in the Globe and Mail, Toronto Star and La Presse. A five-part editorial series also ran in the Saturday edition of the national Globe and Mail, featuring culinary experiences from regions across the province.
Out of home

With driving patterns continuing to increase, especially in our primary market of Toronto, billboards offered a great opportunity to augment the campaign reach. Locations were selected based on geo-mapping statistics that revealed areas with a higher concentration of drivers in our target audience, including the Gardiner Expressway. Billboards were also installed in high volume areas in the Montreal area.

Our out of home executions also ran in the downtown Toronto PATH underground walkway, including a video wall and a wall mural, and a takeover of the Royal Bank vestibule, featuring lighthouse columns. With approximately 200,000 people using the PATH to connect to office towers, subway stations, shops and services on a daily basis, this presented an ideal environment to reach a large concentration of potential visitors.

Public relations

One of the other key ways we delivered unique content to potential first-time visitors was through public relations.

The centerpiece of the campaign in Ontario was Peggy’s Corner – a 28-foot replica of the iconic lighthouse installed at the high traffic intersection of Bay and Wellington in downtown Toronto. Placing one of Nova Scotia’s most iconic landmarks in the middle of one of the busiest corners in Canada was extremely effective in creating a memorable experience for potential visitors. Adirondack chairs surrounded the lighthouse, providing people with an opportunity to read some of our literature and take a moment to escape from their busy day. A video of the Peggy’s Corner case study can be viewed at www.youtube.com/user/NovaScotiaTourism.

Peggy’s Corner was a great success, generating almost half a million dollars in media value, including Citytv’s Breakfast Television remotes from Nova Scotia.

This year, we surpassed our target of $12 million in advertising value through our media relations efforts, generating a total of more than $17 million in value. Our media highlights from 2013 can be viewed at www.novascotiatourismagency.ca/media-marketplaces.
Digital channels continue to grow in importance as more and more travellers research their vacation plans and book their trips online. In 2013, the NSTA developed a strategic digital marketing plan targeted at enhancing the online visitor experience and helping them move through a clearly defined visitor journey, from creating a desire to visit Nova Scotia, to booking a Nova Scotia holiday.

For more information on the strategy, visit www.novascotiatourismagency.ca/digital-marketing.

Novascotia.com is the centre of the province’s digital offering. Traffic to the web, blog and mobile sites increased significantly in 2013 over last year. Subscribers to Nova Scotia’s email newsletter increased by 74%, and the Doers and Dreamers flipbook demonstrated a shift in how visitors are consuming travel information, with over 465,000 online interactions with travel guide content.

The Take yourself there campaign featured an award-winning social media campaign, Hit the Road with Me, inviting contestants to win a road trip to Nova Scotia. The contest generated almost 60,000 contest entries.

Our Facebook fans increased from 50,000 to 150,000 in 2013 – an increase of 200%. Most importantly, we significantly increased our engagement.

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### 2013 results:

**novascotia.com**
- visits 2,253,038 (+15%)
- conversion rate (12%)
- time on site 4.03 mins
- traffic to operator sites 114,882 (+15%)

**Facebook**
- Facebook fans 154,862 (+200%)
- average community involvement: 9.71%

**Twitter**
- followers 14,215 (+59%)
- average engagement rate 0.08%

**Instagram**
- 2013 followers 4,534 (+335%)
- average engagement rate 8.19%
- #VisitNovaScotia tagged photos 20,527 (+619%)

**Pinterest**
- 2013 followers 1,209 (+164%)
- average engagement rate 0.85%
Visit Peggy’s Corner at the corner of Bay and Wellington on Wednesday, May 15 to see an authentic recreation of the lighthouse at Peggy’s Cove. Celebrate the sights, sounds and flavours of Nova Scotia from 12 to 1pm.

Social referrals
- total referrals to novascotia.com 36,554 (+37%)
- referrals from Facebook 71% of visits (+40%)
- referrals from Trip Advisor 19% of visits (+25%)

YouTube
- subscribers 782 (+45%)
- total views 176,818
- 60-second Take yourself there video 29,922 views
- 30-second ad Splash 25,898 views
- 30-second ad Bike 25,891 views

novascotiablogs.com
- total visits 67,888 (+2%)
- unique visitors 59,187 (+1%)
- average visit duration +30%
- social referrals 13,927 (+8%)
- referrals from Facebook 89% of total (+3%)
- referrals from Twitter 4% of total (+30%)
- referrals from Pinterest 4% of total

We rebranded novascotia.com this year to align with the new tourism brand, and increased the size and content of our French site.

We also introduced proactive chat with our visitor information centre staff. This is a great way for potential visitors to engage online with our travel counselors. Demand for online chat has increased exponentially, with an over 1,700% increase, and great potential for growth.

We are continuing to implement the digital strategy, consistently evaluating our performance and channels for the best possible return on investment. We know digital is only becoming more important. We are incorporating the latest technology, and we will be capitalizing on the most efficient and effective ways to reach potential visitors through web, mobile and social media.
We have also been aligning our activities in our overseas key markets with the long-term strategy. Outdoor enthusiasts from the UK and Germany offer great potential for growth.

**United Kingdom**

In the UK last year, we expanded our relationship with the Jamie Oliver brand. We reached 30,000 culinary enthusiasts, and potential visitors, when Nova Scotia was featured at Jamie’s Big Feastival – a celebration of food and music – at the end of August. We also reached millions of Jamie’s fans through his magazine and social media channels.

The new Nova Scotia brand ads were also featured in the London underground for four weeks in January and February – reaching 28 million commuters.

During the peak season, from June to September, we welcomed approximately 3000 more visitors from the UK compared to 2012 – an increase of 28%.

**Germany**

In Germany, we ran an in-store campaign in Globetrotter, the country’s largest outdoor retailer, to reach 130,000 consumers in our target demographic. And we reached thousands more through the store’s magazine and website.

From January to June, we received more than 10,000 website visits from Germany, an increase of 19% over 2012. From June to September, our overall visits from Germany are flat compared to 2012, and we will pursue strategic opportunities to grow this market. With Condor increasing its flights, we are seeing some positive indicators for next year.

**Atlantic region**

In Canada, we know visitors from outside the Atlantic region are more likely to stay longer and spend more. We have made a strategic decision to realign our spending to the Quebec and Ontario markets. To do this, we reallocated $1 million of our regional spend.

In the region, we have been working together with industry to develop new, innovative ways of doing things to push out rich content through our marketing channels. Our regional Weekend Road Trip campaign sought to motivate travel from within the region during the fall months.

The fall campaign ran from September 9 to October 16. By donating a package for our online contest, operators received huge exposure for their accommodation, product or experience.
Regional campaign results:

- 33,000 page views to individual package pages
- 9,500 page views to the Packages main landing page
- 4,200 clicks to operator websites
- 205 phone calls to tourism operators
- novasotia.com visits +13%
- clicks to operator sites +15%

Our Live at Five remotes were another strategic partnership opportunity. We worked with industry partners across the province to promote the amazing products and experiences available for those regional visitors looking for a great vacation close to home.

In our first year, we have put the elements in place to introduce a unique, compelling Nova Scotia brand in our key markets. A brand needs time to be absorbed into the hearts and minds of potential visitors. We must be consistent – continuing to build a sense of vibrancy in our key markets to deliver a strong, unique presence that will inspire visitors to travel to Nova Scotia.

What industry can do

We encourage industry partners to connect with us through the website, or with staff, to find out how to participate in our travel trade opportunities and media fams.

Our regional campaign is another great way to get involved. We will also be looking to partner with industry and regional tourism industry associations on our Nova Scotia media rally in 2014. Please stay tuned to inTouch for more details on our upcoming partnership opportunities.
The NSTA is committed to working with all dedicated partners to make a difference and achieve sustainable growth.
While we have had some accomplishments in our first year, there is still a great deal of work ahead. In 2013, we’ve gone after some of the less complex opportunities, where it’s been relatively easy to move the mark.

We’re now getting to the hard part, but striving to move forward. We can’t do it alone. We need the help of all our operators, stakeholders and partners to get there.

**Everyone has a role to play**

We know the role of the NSTA is to bring more first-time visitors to Nova Scotia. The role of industry is to engage those visitors, and increase return visits. Together, we are focused on the customer – the visitor – bringing more of them to Nova Scotia to build our industry and increase profitability for tourism businesses throughout the province.

We know the world is changing. The industry is changing, and the economy is changing. We need to adapt and evolve to remain competitive and increase our share of that growing market. But that will only happen if we are committed to working together, and supporting one another, to address the long-standing issues we face. Together, we will make the tough decisions that will turn the industry around.

*We will keep focusing on the bright spots, and the progress we are making, and building on what works.*

The NSTA is committed to working with all dedicated partners to make a difference and achieve sustainable growth.

In Nova Scotia we have so much to offer our visitors, and we will be focused on making the strategic decisions that allow us to bring more of them to Nova Scotia.

Please read our tourism strategy at [www.novascotiatourismagency.ca/tourism-strategy-nova-scotia](http://www.novascotiatourismagency.ca/tourism-strategy-nova-scotia), review the NSTA website, chat with our staff, and sign up for inTouch to see how you can participate.

We want to challenge industry operators to take risks and try new things. What will you do differently in 2014 to grow your business and help us move the industry forward?
Appendix:

The NSTA tourism marketing budget for 2013 was just over $5 million. Here is a breakdown of our spending by channel and market.

**Spend by market**

- **Canada**: 26%
- **Ontario**: 26%
- **US**: 20%
- **Quebec**: 11%
- **Maritimes**: 7%
- **Germany**: 5%
- **UK**: 5%
- **Maritimes**: 7%

*US marketing includes ACTP spend.

**Spend by channel**

- **TV**: 35%
- **Digital**: 27%
- **Print**: 17%
- **Public relations**: 3%
- **Out of home**: 7%
- **Sales**: 11%
Grand Chief Membertou 400 Celebration
Nova Scotia Tourism Agency

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