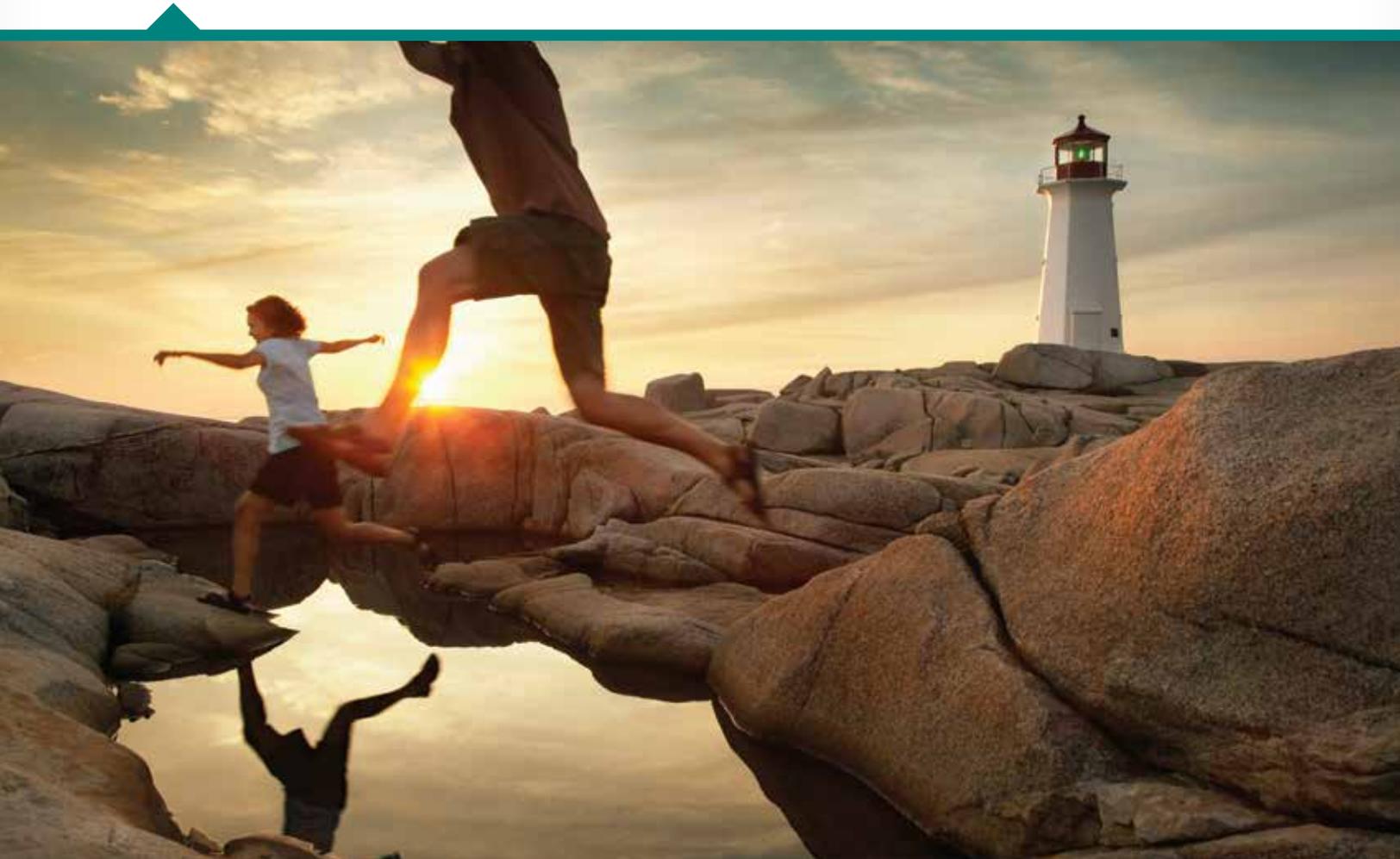


A Tourism Strategy for Nova Scotia





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Tourism Matters

Tourism is a \$2 billion industry in Nova Scotia. It provides 24,000 jobs that support families in every region of the province. Beyond the economic impact, it helps define Nova Scotia, perhaps more than any other single sector of our economy. Visitors form an impression of the place and the people, and share them with friends and family. This can encourage more people to visit and enhance our reputation worldwide. Tourism can therefore be a source of pride. The impressions and experiences of visitors should matter to Nova Scotians.

While tourism is already a vital contributor to the economy in all parts of the province, there is vast potential to grow—to build on what Nova Scotia offers; to market our province more strategically and creatively; to understand what we are doing well, and what we are not doing well; to offer high-quality service and more compelling experiences; and to make it easier for visitors to get here and travel every part of the province once they are here. These are the elements of future success.

Tourism growth is real economic growth because it brings new dollars into the provincial economy. It is export trade. Nova Scotians supply the products and services to customers who come primarily from outside the province.

For two years the tourism industry in Nova Scotia has been undergoing a critical self-assessment. Government and the industry, working together, have consulted with more than 1,000 Nova Scotians in and outside the sector. It became clear, from government's perspective, that there needed to be a new, more collaborative way to work with the industry. The Nova Scotia Tourism Agency (NSTA) is the result. It is a "special operating agency," which means that while it is a public entity, it has greater management flexibility to improve performance.

The creation of the Nova Scotia Tourism Agency is a departure that fulfills the government's commitment to partner in a very real sense with private tourism operators in order to build a bigger, more profitable, more stable industry. The NSTA is led by a CEO and advised by a private-sector board. It's a new model that offers strategic advantages to the industry in terms of flexibility, responsiveness, and cohesion—critical marketing assets in today's fast-changing and instantly connected marketplace.

Working with the industry, the NSTA developed this five-year strategy to begin to tap into the unrealized traveller potential. It will take a more business-like approach to tourism to build a more profitable, vibrant tourism industry that delivers opportunities for greater prosperity across Nova Scotia. This won't happen immediately. There is a great deal of work to do. But with the industry, NSTA, government, and Nova Scotians from all walks of life working in concert, great things will happen for the industry and for the province.

The Challenge

In the past 10 years, visits to Nova Scotia have declined by 9 per cent and visits to Canada are down 18 per cent, while global travel continues to grow. Nova Scotia also faces a number of barriers to industry growth, including a lack of clarity about roles and responsibilities of government and the industry; widely dispersed spending and investment; unreliable or unavailable transportation links to the province; aging product; outdated technology; and an uncoordinated approach to major events. Our base of new visitors is declining—just 19 per cent of Nova Scotia’s visitors are here for the first time.

The ever-increasing pace of technology, and the shift from traditional to digital, means we must work harder to stay ahead of the curve. Our visitors are looking for new ways to receive information and to engage. We’re seeing a steady shift from print literature to online forms of communication that must be addressed.

Sixty-five per cent of travellers research destinations online before deciding where to go; 85 per cent use their smartphones while travelling, and 70 per cent update their Facebook status while on vacation. Two-thirds of would-be tourists view videos to help select destinations. Clearly, Nova Scotia requires a first-rate online tourism presence and a mobile plan, and must fully capitalize on the power of social media’s influence on travellers’ decisions.

In some of our potential markets, there appear to be limited awareness and vague perceptions about what Nova Scotia offers. Obviously, that has to change. Nova Scotia has numerous attractions for visitors, although many need to be refined in quality and promoted with the right messaging.

Research and consultation at home and in other jurisdictions broadened our insight. Among the findings:

- *Visitors want to move easily within the province.*
- *More flights, especially international flights, would be a major asset.*
- *Travellers need to understand where they are going. A clear, consistent brand—a common identity unique to the province—and coordinated messages to support the brand are essential.*
- *Marketing—including advertising, promotional material, and online content—should target key growth markets.*
- *Industry operators and workers need to be well trained and highly skilled.*
- *Nova Scotians need to see tourism as an important economic contributor, and to appreciate and welcome visitors.*
- *Sophisticated metrics and research of market trends must be the industry standard.*
- *Experiential tourism should be a key component of our product. It will help to connect various attractions, result in longer visits, and spread economic benefits across the province.*

Despite identified weaknesses, Nova Scotia has so much to offer visitors, with a spectacular seacoast, incredible icons, and our legendary hospitality.

Tourism still accounts for 2 per cent of all economic activity in Nova Scotia. It provides almost \$800 million in annual income to Nova Scotian families, and generates \$173 million a year in tax revenue that helps pay for public programs and services.



The Opportunity

Simply stating a goal to grow the industry is easy, but growth is by no means easy to achieve.

The goal: *More visitors, who spend more and stay longer*

We know that first-time visitors tend to travel more throughout the province, spending 42 percent more than repeat visitors and twice as much on accommodation. That is where the growth potential lies; research shows that once people visit Nova Scotia they tend to come back.

Global competition for tourists is intense. To succeed, Nova Scotia must differentiate itself from the pack, innovate, and compete successfully in the global marketplace. Those key elements of the government's jobsHere economic strategy apply to tourism as much as they do to every other sector of the economy.

This five-year strategy is a visitor-centred plan. The product is Nova Scotia—one Nova Scotia, rather than geographic segments, events, or specific attractions. The clear and sustainable competitive advantages of Nova Scotia will be at the core of a dynamic and profitable tourism economy.

The province is targeting travellers, as opposed to “tourists.” Travellers are curious by nature and seek out memorable experiences they can immerse themselves in. Nova Scotia is generally seen as a peaceful, relaxing vacation by the sea. That is a good starting point. The opportunity is to build on that existing perception and make Nova Scotia the place for exploration and discovery. Our market is the outdoor enthusiast—not the extreme adventurer, but the “soft adventurer” who appreciates local culture and cuisine after a day spent hiking or whale watching.

Nova Scotia is different and offers a unique experience. It is a small, compact province with vibrant communities, a diverse landscape and culture, and authentic and down-to-earth people. We want visitors to choose Nova Scotia first, and then move throughout the province and experience all we have to offer. To do that, we must clearly communicate what sets us apart as a must-see destination.

After extensive consultation and research, five priorities emerged to guide direction and drive growth over the next five years:

Leadership and Collaboration:

It will be important to create visitor awareness among Nova Scotians, and to build pride of place and an enhanced appreciation in Nova Scotia for the value visitors bring to the economy.

Inspirational, Strategic Marketing:

A compelling Nova Scotia tourism brand must create an emotional connection with potential visitors, differentiate Nova Scotia from its competitors, and align with the overall provincial brand.

Evidence-Based Decision Making:

Research will be integral to strategic decisions. We will capture and interpret market intelligence to support decision making, and we will focus investment on the best opportunities for profitable growth and maximum economic impact.

Higher-Quality Products and Experiences:

To inspire and motivate first-time visitors while meeting and exceeding visitor expectations, we must raise the bar on the products and experiences Nova Scotia offers and invest strategically to make improvements.

Improved Access to Nova Scotia and Throughout the Province:

Collectively, we must support all initiatives that enhance access to the province and bring new visitors, through all modes of transportation. Once here, visitors must be able to easily experience the entire province effectively and efficiently.

In an increasingly competitive global travel market, Nova Scotia needs an aggressive, focused approach to grow tourism. The new, collaborative approach between government and industry is designed to make us collectively more entrepreneurial and to promote innovation and competitiveness.

NSTA will be a leader, advocate, and promoter of the industry both inside and outside government. Within government, the Special Operating Agency will advocate effectively for changes that make it easier for tourism operators to improve and add new experiences and services for their customers. The NSTA will be in a position to help the industry cut through red tape and capitalize on market opportunities.

Outside government, NSTA's purpose is to promote Nova Scotia as a must-see destination and to bring more visitors to the province. This new governance model solidifies the partnership between industry and government through an industry-led advisory board.

Government will focus on product development and investments, based on research and market intelligence. Coordinated and directed investment will revitalize public infrastructure and provide a catalyst for tourism development. The industry must also be prepared to make investments that enhance the quality of the visitor experience and to generate innovative business opportunities.



The Strategy

Attract more visitors who spend more and stay longer.

As we advance the goal, revenue and industry profitability will grow, benefitting industry operators, workers, and families throughout Nova Scotia.

Leadership and collaboration within and outside the tourism sector is essential to first create and then sustain awareness of the value of the visitor economy. Nova Scotians must see themselves as part of the effort to make every visitor welcome.

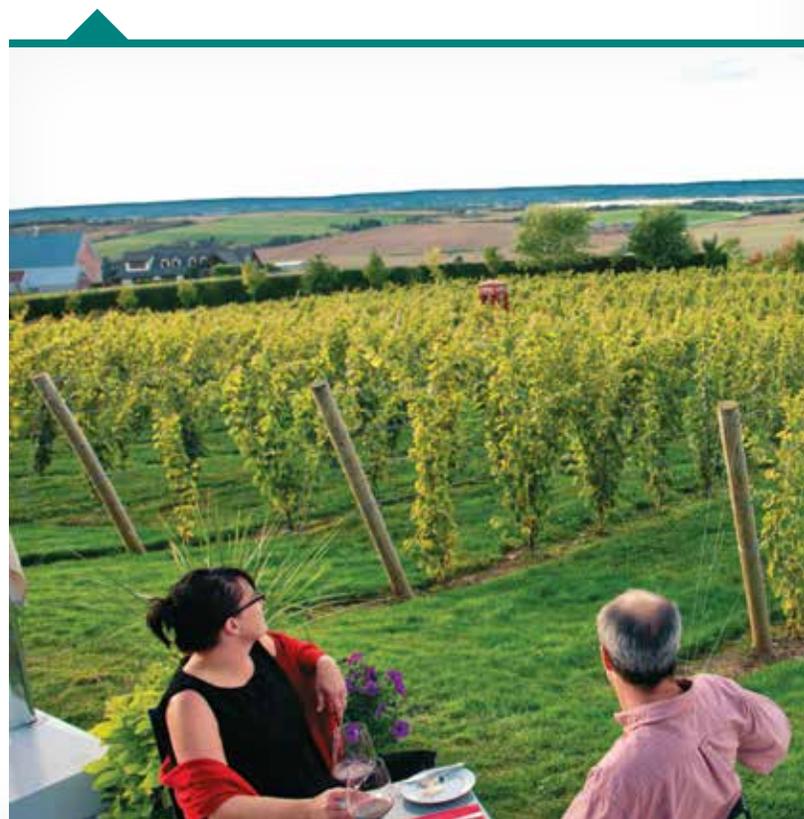
The creative challenge is to connect emotionally with potential first-time visitors and create the desire to travel to Nova Scotia. Nova Scotia needs to be seen in a new light, one that conveys a sense of vibrancy, excites the outdoor enthusiast, and differentiates the province from its global competition.

Collaboration will also be key in efforts to improve the visitor experience and to provide high-quality services and products. Government and industry will work together on investment strategy and decisions, workforce development, and promotional activities and events.

The rapid evolution of digital communications and marketing platforms only heightens our need to be responsive and flexible in all aspects of marketing and delivering the tourism experience. The reality that visitors are constantly connected makes data collection and evidence-based decisions more vital than ever. Good information, well analysed and available quickly, will help Nova Scotia adjust to changing visitor expectations and trends, capitalize on new opportunities, and adjust our course as needed.

For travellers, getting here, and then getting easily around the province, has been a challenge that limits growth and works against parts of the province. Once again, a collaborative effort that includes the tourism industry and government is required to address these challenges.

The details that follow are a guide—a strategy—to strengthen, build, and expand tourism in Nova Scotia over the next five years. During that time, economic conditions, and certainly technology, will change. The strategy is, as it must be, flexible enough to adapt to such dynamics.



Leadership and Collaboration

Objective

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

Enhance understanding and strengthen the partnership between government and the industry:

- Develop a comprehensive communications and industry outreach plan to clearly define roles and responsibilities, reducing duplication and ensuring that all partners are working efficiently for industry growth. Communications will introduce and increase awareness of the NSTA and its mandate.
- Take a proactive approach, including an industry/partners website, to engage tourism influencers and stakeholders and to share information with the industry about research and statistics, marketing strategies and tactics, partnership opportunities, and other relevant matters.
- Create an accountability framework with performance targets in collaboration with the industry.
- Issue annual progress reports.

Promote one Nova Scotia, communicate what sets us apart, and build pride among Nova Scotians:

- Develop a marketing and communications plan to promote awareness and appreciation among Nova Scotians of the value of tourism and engage key stakeholders to champion and promote tourism in Nova Scotia. The plan will:
 - highlight the value of tourism
 - build pride of place / pride in tourism
 - encourage Nova Scotians to travel their province and to invite family and friends to visit
 - identify and empower Nova Scotian ambassadors to help promote the province
- Communicate a strong, unified Nova Scotia brand, supported by tools and partnership opportunities that help the industry integrate and align its marketing with the brand.

Build an efficient, sales-focused approach to serving visitors:

- Evaluate visitor servicing standards, resources and programs, and make recommendations to improve sales and service.



Inspirational, Strategic Marketing

Objective

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

Implement a compelling brand and build an effective campaign:

- Differentiate the Nova Scotia brand from its competitors, create an emotional connection, and generate a desire to visit for the first time.
- Implement a multi-year campaign to focus on first-time pleasure visitors who are outdoor enthusiasts or culinary and cultural enthusiasts.
- Integrate the brand across all marketing channels, including paid media, digital, travel trade, travel media, visitor services, literature, and partnerships.
- Ensure the delivery of the right content to the right market at the right time. This will include a program to guide design and production of brand-consistent marketing materials for Nova Scotia's best attractions, experiences, and events.

Lead the industry in technology:

- Implement a multi-year digital strategy to optimize new and emerging technology and integrate Nova Scotia's online channels, including novascotia.com and mobile and social media platforms.
- Evaluate tourism print literature. Increasing use of digital communications tools suggests that an evaluation of tourism print literature (Doers & Dreamers travel guide, travel maps, etc.) is required. Work with partners to develop a fresh literature program.

Invest in key target markets; balance investment and risk; manage short and long-term growth opportunities:

- Create detailed business cases and investment models for key markets in Canada, the Northeastern United States, the United Kingdom, and Germany that recognize the need for both short and long-term investment.
- Explore new and emerging markets, such as China and Brazil.

Increase the efficiency of Nova Scotia's marketing partnership programs by reducing duplication and maximizing all investment opportunities:

- Develop a new marketing partnerships program that allows partners to align with and participate in provincial marketing campaigns. Current funding programs will be evaluated with input from industry.

Evidence-Based Decision Making

Objective

Base decisions on the best available evidence in order to optimize investment and operational effectiveness.

Develop a program that annually measures return on investment:

- Generate annual market investment insights by using market allocation models and other tools.
- Use the Nova Scotia Tourism Economic Impact Model (TEIM) to guide tourism investment and programming decisions.

Evaluate the effectiveness of the tourism campaign in reaching first-time visitors:

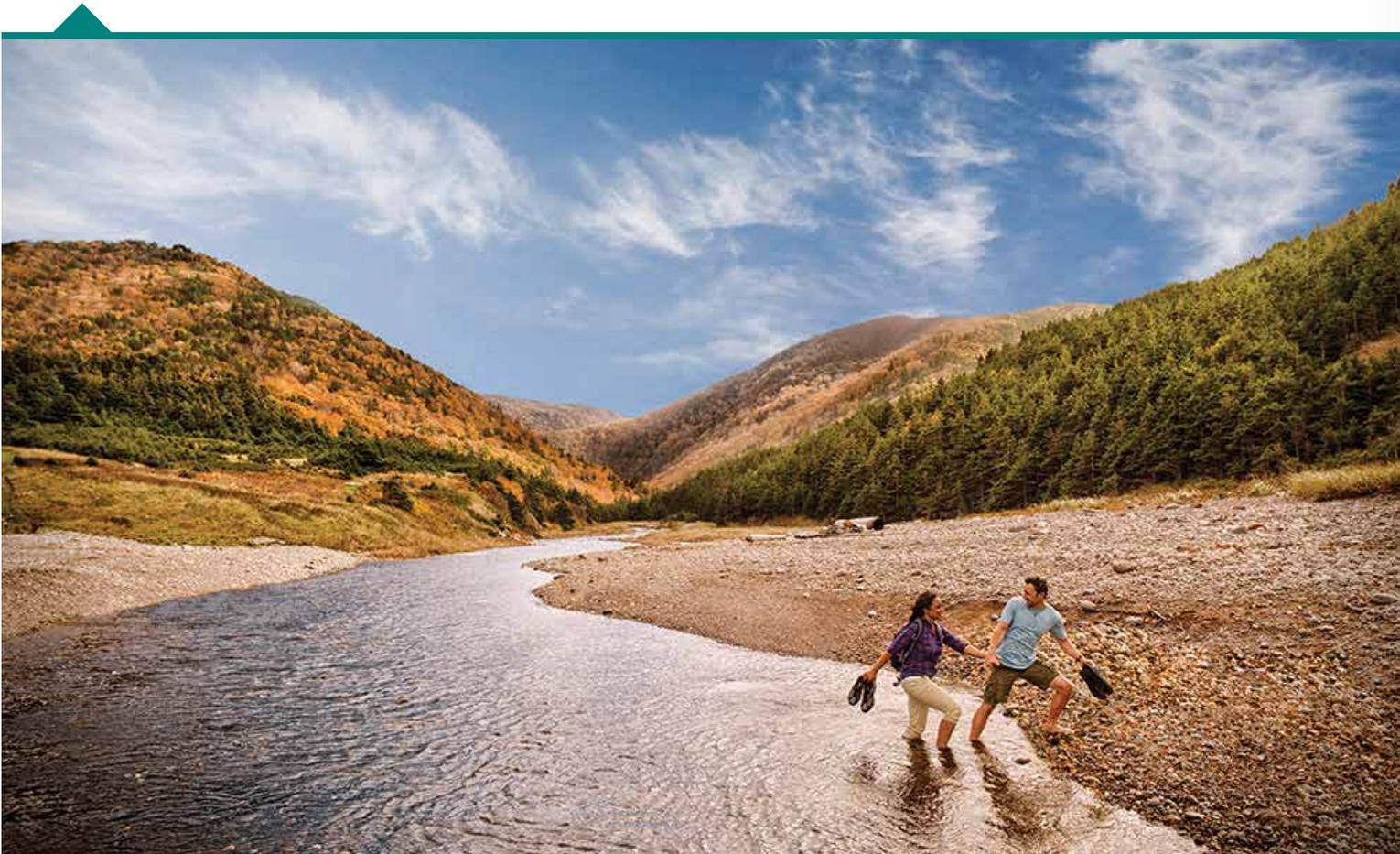
- Develop and implement a “brand health” methodology (including destination awareness, brand personality, etc.) to support an annual tourism campaign review, and make adjustments where needed.

Survey visitors, potential visitors, and industry sources to gain rich information and regular insight:

- Use the NSTA online visitor panel to support management decisions in all areas of tourism.
- Prepare an annual situational analysis, including trends, forecasting, environmental scans, issues, and opportunities, to support NSTA planning.

Monitor first-time visitors to Nova Scotia:

- Use new and established research systems to track first-time visitors to Nova Scotia.



Higher-Quality Products and Experiences

Objective

Develop Nova Scotia's most competitive and distinctive tourism assets to ensure a high-quality experience that appeals to the target high-yield market.

Build on Nova Scotia's tourism icons:

- Identify destinations with a cluster of tourism assets and the demonstrated ability to attract visitors to further enhance market appeal.
- Design and develop research-based models to identify and guide provincial investment decisions in leading tourism icons.
- Collaborate with key destination and business leaders to focus tourism planning and develop iconic destinations, or destinations that have indicated solid potential for future tourism development.
- Allocate provincial funding and leverage funding from partners to implement initiatives related to these iconic attractions.

Improve the quality of products and experiences, create innovative new products, and rejuvenate existing iconic products:

- Develop a tourism development program to attract and assist industry and businesses in creating new and more competitive products and experiences that will appeal to and motivate more first-time visitors.
- Work with partners and industry to enhance the quality of existing icons and to develop new tourism products for the highest-yield market segments.

- Encourage investments in products and experiences that align with the Nova Scotia brand, connect with the Canadian Tourism Commission Signature Experiences Collection, and have the ability to motivate visits. Examples include improving coastal hiking trails, enhancing the quality of UNESCO World Heritage sites, providing culinary and wine experiences, and differentiating experiences that reflect Nova Scotia's competitive strengths, such as whale watching and tidal bore rafting.

Establish a quality, technically advanced, and globally competitive workforce, and provide educational opportunities to develop the next generation of tourism leaders:

- Expand awareness of tourism as a viable career path for young people across Nova Scotia, and support education in secondary and post-secondary institutions.
- Provide entry-level skills training to underrepresented groups and professional development opportunities for new and existing tourism employees.
- Provide ongoing professional development for supervisory and management positions.

Adopt a strategic, government-wide approach to attract and fund major events:

- Develop a comprehensive approach to establishing major events as a means of attracting first-time visitors.
- Ensure that events are properly funded and that they deliver quantifiable results and a measurable return on investment.

Leverage the new Halifax convention centre as an asset to tourism across the province:

- Encourage visitors attending events at the new convention centre to travel throughout Nova Scotia.
- Ensure that the centre reflects the best tourism attractions and experiences and that it encourages convention visitors to stay longer, spend more, and travel throughout the province.
- Take a pro-active approach, in partnership with the convention centre, to gather information and resources on all areas of the province that help convention delegates become aware of all that Nova Scotia has to offer.



Improved Access to Nova Scotia and Throughout the Province

Objective

Improve access to Nova Scotia for visitors and enhance their ability to travel throughout Nova Scotia.

Support a province-wide approach to better provincial signage to enhance the visitor experience:

- Identify ways to improve signage to ensure positive visitor experiences and easier travel throughout the province. The result should be a comprehensive signage strategy.

Expand access to the province through all modes of transportation:

- Actively support initiatives to increase access to the province, including improved air and sea access.
- Seek joint marketing initiatives, in partnership with transportation providers and other stakeholders, to support increased transportation capacity to Nova Scotia.

Measuring Our Progress

We are striving to increase overnight visitors by 1 per cent per year in each year of the five-year life of the strategy. In addition, we are seeking to increase non-resident visitor revenues by 4 per cent annually and to, at minimum, maintain room nights sold outside of Halifax at 2012 levels.

We will also establish a baseline to gauge Nova Scotians' recognition of the role tourism plays in the economy, community development, and social well-being.

Tourism is a rapidly evolving, highly competitive industry. To stay in the game and win, Nova Scotia must evolve right along with it.

Collaboration between the province and the industry will make it easier to respond effectively to change. Evidence-based decisions, higher-quality products and experiences, and improved access to and throughout Nova Scotia will all help to build a stronger, more vibrant industry. Inspirational, strategic marketing—in the right place at the right time with the right message—is essential.

With government and the tourism industry working together to focus on the visitor, and Nova Scotians as our ambassadors, we have the elements of tourism success.





