



Going the Distance – Intro Video

Video Link:

<https://www.youtube.com/watch?v=MIK5PsTxyAghttps://youtu.be/MIK5PsTxyAg>



Thank you, and good afternoon everyone!

It's always tough to follow Minister MacLellan but I'll do my best.

We would like to thank him for his continued support of the tourism industry and his keen interest in the file. I've had the opportunity to travel to meetings with Minister MacLellan, and I can tell you, he is one of our best salespeople and ambassadors!

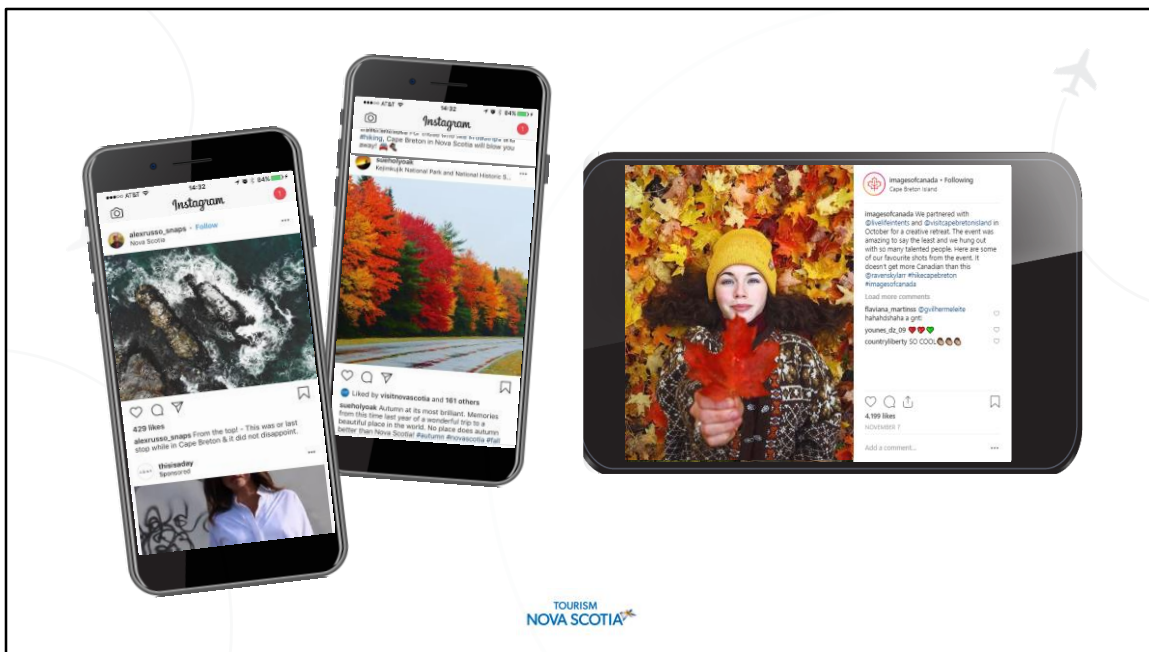
I hope you're all enjoying the conference so far.

Thank you to the TIANS team for putting together another great agenda. I'm sure each of us will leave with new information, ideas and connections.

I'd like to ask members of Tourism Nova Scotia's Board of Directors to please stand. Our Board is Chaired by Irene d'Entremont and is made up of 10 business leaders from across the province. Thanks to each of you for being here today, and for the expertise and guidance you bring to our organization.

I'd also like to ask members of my Tourism Nova Scotia team who are in the room to please stand. These folks are among the best in the country at what they do. They're passionate about bringing more visitors to Nova Scotia and working with tourism operators to create amazing experiences. They're excited to be here to learn more about all of you, so please take a moment to say hello over the next few days.

And finally, a huge thanks to everyone who appeared in our opening video. Great Job!



We really do have so much to celebrate, and it's because of businesses, organizations and communities like yours that Nova Scotia is capturing the attention of travellers around the world.

I know personally that my tourism industry colleagues across Canada, and as far away as Iceland and Scotland, are looking at our province as a best practice in how we're approaching tourism. I have to say, it felt pretty good when I got a call from Southwest Ontario Tourism a few weeks back, inviting me to speak at their upcoming conference because they want to learn from us! Way to go everyone – Nova Scotia is getting noticed!

# A BIG OPPORTUNITY



TOURISM  
NOVA SCOTIA

There has never been a bigger opportunity for our industry than the one we have right now. It's an opportunity that will create a better future for our families, more profitable businesses, more vibrant communities and a healthier economy for our province. It's an opportunity that already has many organizations and individuals doing what they can to effect change and challenge the status quo. That opportunity is the \$4 billion tourism revenue goal.

How many people in the room are familiar with the \$4B goal?

Great. Most of you.



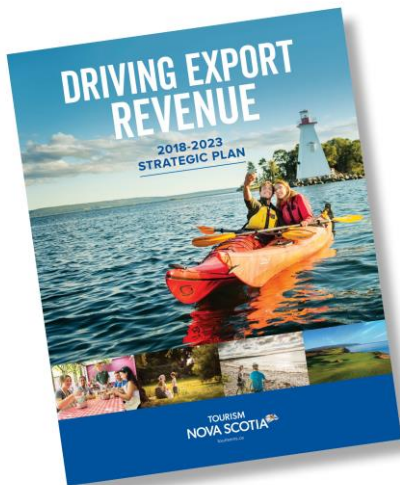
Nova Scotia's tourism industry has a goal to increase tourism revenues to \$4 billion by 2024. This goal was given to our industry by the Ivany Commission four years ago in 2014.

The Ivany Commission produced a report that identified big challenges facing our province, like our fiscal situation and aging population. It told us that we had to change our attitudes and that clinging to old approaches to business and government were not going to move us forward.

We were challenged to come up with new ways of doing things, and to invest our time and resources to drive results.

It's exciting to see how tourism businesses, community organizations and municipal, provincial and federal governments are responding to this call to action.

Nova Scotia needs industries like ours to pull out all the stops. We need to be more than good, we need to be great.



## TOURISM NOVA SCOTIA APPROACH

- Aligned with provincial government priorities
- Export-focused
- Research-based decisions
- Visitor trends
- Outcome-driven
- Partnership and collaboration



I'm confident that Tourism Nova Scotia's strategy to lead the industry towards the \$4B goal will help us reach our full potential, but it will take everyone aligning behind the goal and owning our roles.

Our strategy is an export strategy, which means Tourism Nova Scotia's efforts are all about attracting more leisure visitors to Nova Scotia and as many dollars as they can spend!



## SPENDING

The following strategic pillars guide how Tourism Nova Scotia invests our budget.

## 4 PILLARS OF OUR STRATEGY



ATTRACT FIRST-TIME  
VISITORS TO NOVA  
SCOTIA



INVEST IN MARKETS  
OF HIGHEST RETURN



FOCUS ON WORLD-  
CLASS EXPERIENCES



BUILD NOVA SCOTIA'S  
TOURISM CONFIDENCE

TOURISM  
NOVA SCOTIA

Our research, our marketing, our industry programs, our business and experience development activities align with the pillars of **attracting first-time visitors; investing in markets of highest return; developing and promoting world class experiences; and building tourism confidence.**

You can visit our corporate website to learn more about these pillars or to download a copy of our recently updated strategy.



Nova Scotia's tourism ecosystem is healthy and strong. Many organizations are working to grow tourism revenues. For example, the **Department of Communities, Culture and Heritage** is responsible for the attraction, investment, support and development of major events. We're going to hear more about their government-wide Nova Scotia Event Strategy later this afternoon.

Festivals and events can range from huge signature-type programs that attract visitors to Nova Scotia, like the upcoming Scotties Tournament of Hearts, to smaller ones like Eastern Shore's annual *Seaside Christmas* shopping festival, designed to generate business in the shoulder season.

Either way, events are very important drivers of tourism in our quest for \$4B. While **Communities, Culture and Heritage** is the lead on events for the province, Tourism Nova Scotia is working collaboratively with the Events Team to promote and leverage event through our marketing channels and assets.

**Discover Halifax** and **Events East** work together to attract meeting and convention visitors to the province. A huge congratulations to Events East on a successful first year operating the Halifax Convention Centre! It's been wonderful watching

delegates sporting their badges, exploring the city, and enjoying our many amazing restaurants, shops and experiences. Through our pop-up visitor information booth at the convention centre, Tourism Nova Scotia has been promoting all the wonderful things visitors can do, not just in the downtown core but throughout the province.

**Taste of Nova Scotia** continues to elevate Nova Scotia's brand as a culinary destination through promotion of its members. For the past two years we've been thrilled to partner with Taste of Nova Scotia to give visitors a unique culinary experience in our Halifax waterfront visitor information centre. Through food demonstrations and education, we share information about the more than 200 Taste of Nova Scotia producers, processors, culinary experiences, chefs and restaurants across the province. We also love to promote the Good Cheer Trail and Chowder Trail. I've received some wonderful letters from visitors sharing how much they've enjoyed eating and drinking their way around Nova Scotia! Kudos to everyone involved in making the trails a reality!

Our sister Crown corporation, **Develop Nova Scotia**, leads the development of high potential and priority infrastructure across the province. This of course is hugely important to our industry. They're in the business of developing "places" that will attract people to visit, live, work and invest in our communities. We love the team at DevelopNS – they're super-talented and great to work with.

The **Tourism Industry Association of Nova Scotia** as you know, is the advocacy organization for Nova Scotia's tourism industry. They work to advance issues and opportunities that are important to you, their members.

The **Nova Scotia Tourism Human Resource Council** works with provincial and national stakeholders to help address human resource challenges facing our industry.

**Halifax International Airport Authority**, in partnership with the provincial government and Tourism Nova Scotia is working to build and maintain air routes between Halifax and our priority tourism markets. The airline business is very competitive. Airlines don't just say "we hear Halifax is a great place, let's give them a daily flight..."...it requires considerable business development and lobbying efforts, as well as incentives. We're very lucky to have the seasoned team at the airport leading the charge for us.

The **Atlantic Canada Cruise Association** in partnership with the **Halifax Port Authority, Sydney Port Authority** and small ports throughout Nova Scotia are aggressively creating the conditions and attracting cruise ships to ports around the province. Nova Scotia has just experienced its best cruise year ever with more visitors and bigger ships than ever before. While most of these visitors do not stay overnight, they are hugely important to tour companies, restaurants and retailers –

and they come as late as November!

As you can see, tourism growth is not just one organization's responsibility. It's up to all of us to make \$4B a reality. Now really is the time for us to pull together and go the distance.



TOURISM  
NOVA SCOTIA

So, what does it mean ... “go the distance”?

We hear it used in sports references, and in situations where we need to persevere to achieve a goal.

Here’s a definition I found which seems appropriate in the context of our \$4B goal.

# GO **THE** DISTANCE

TO HAVE THE ENDURANCE TO SEE A DIFFICULT,  
SUSTAINED CHALLENGE TO ITS NATURAL END  
WITHOUT FALTERING



TOURISM  
NOVA SCOTIA

*to have the endurance to see a difficult, sustained challenge to its natural end without faltering*

To make things really happen, we must want to achieve our goal more than anything. When you're passionate about something, like my team at Tourism Nova Scotia, it's hard to not go the distance. Working hard, doing things differently, innovating, and achieving results is what we do. Anything else is unthinkable. I know a lot of you in the audience approach your work in the same way.



Does anyone remember the old baseball movie, *Field of Dreams*, featuring Kevin Costner? I'm sure if you are close to my age bracket you do.... everyone LOVED Kevin Costner.

Kevin's character in this movie was driven to build a baseball field in the middle of a cornfield, in the middle of nowhere Iowa. I've been to Iowa many times on business – there are a lot of cornfields and a lot of “middle of nowhere.” Despite all the barriers he faced -- skeptical neighbours, foreclosure on his farm, pressure from family, he persisted and achieved his goal. For him there was no other option.

Going the distance may sound daunting and hard. Depending on our personal perspectives and experiences, it may even sound impossible. But our goal of \$4 billion in tourism revenues by 2024 is attainable. It's not “a field of dreams,” it can be reality if we rely on our research, follow our plan and work together to make it happen.

As tourism professionals, we must believe that if we do our job, and if we're better at it than the competition... indeed... people will come.

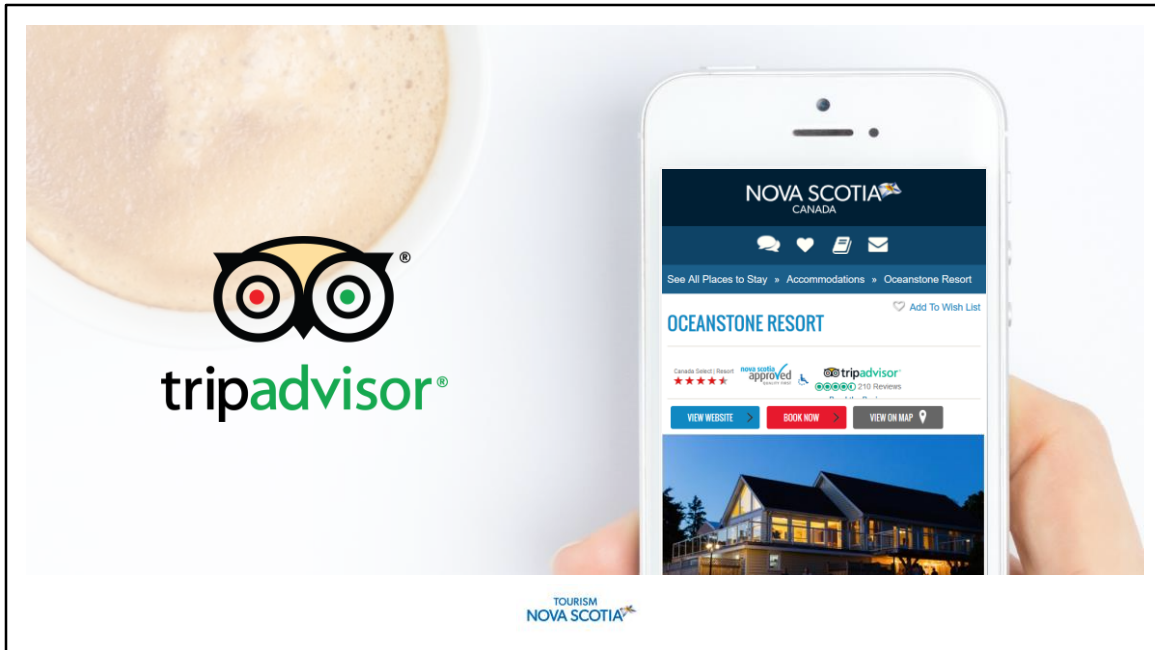


Whatever your perspective, it's not lost on me how important positive attitudes are to achieving success.

It's also not lost on me that this is going to take hard work on many fronts.

Let's always remember we're competing with the best-known travel destinations in the world to attract visitors. In this age of digital marketing, we need to be compelling. The more we understand our customers and invest in the experiences, accommodations, spaces, and products they want, the more successful we'll be.





Like incorporating TripAdvisor peer reviews on accommodation listings on novascotia.com, because that's how people are making their travel decisions now, and it encourages everyone to strive for higher quality.

We're doing things differently to truly maximize the opportunity that tourism presents for our economy and our communities, and we're excited to work with anyone who shares that same desire.

# TOURISM SPENDING CATEGORIES



TRAVEL AGENCY  
& RESERVATIONS  
SERVICES



ACCOMMODATIONS



TRANSPORTATION



FOOD & BEVERAGE



RECREATION &  
ENTERTAINMENT



CULTURAL SERVICES



OTHER TRAVEL-RELATED  
PURCHASES

TOURISM  
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When we think of tourism we tend to think only of the person who is coming to Nova Scotia on holiday. Tourism is much bigger than that. It includes Nova Scotians travelling within Nova Scotia, it includes people who are visiting friends and relatives, it includes people who are travelling to parts of Nova Scotia for sports tournaments and dinners. And because tourism is so big and broad, it impacts all parts of the province.

Tourism is the taxi driver who is taking you from the airport to Halifax.

Tourism is the chef in the restaurant in Antigonish.

Tourism is the cruise ship docking in Sydney.

Tourism is the gas station where you stop to fill up the rental car in Kentville.

It's the spending that is done by these visitors that is used to calculate tourism revenues.

# TOURISM REVENUES

2017: TOURISM REVENUES ARE ESTIMATED AT

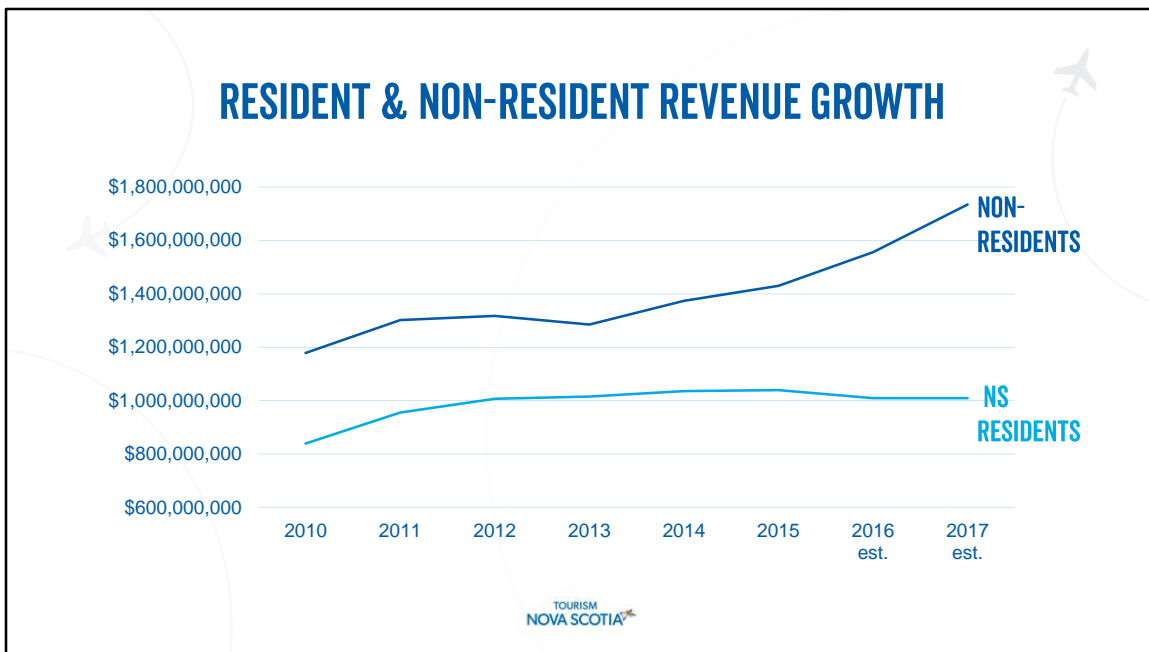
**\$2.7 BILLION**

**37%**   
Nova Scotians travelling  
within Nova Scotia

**63%**   
Non-resident visitors

TOURISM  
NOVA SCOTIA 

As of 2017, tourism revenues are estimated at \$2.7 billion. Of that, 37% (or just over \$1 billion) is from Nova Scotians travelling within Nova Scotia. And 63% (or about \$1.7 billion) is from non-resident visitors coming to Nova Scotia.



Tourism revenue growth in the past four years has come from non-resident visitors, and that trend must continue to reach \$4 billion.

We absolutely need Nova Scotians to continue to enjoy what we have to offer, but our population isn't big enough for revenue growth to come just from Nova Scotians. We need to attract more visitors to the province and we need them to spend, spend, spend while they're here!

# YTD SEPTEMBER VISITATION

-0.4% COMPARED TO  
2017

1,951K NON-RESIDENT  
VISITORS

+9% OVER  
2016

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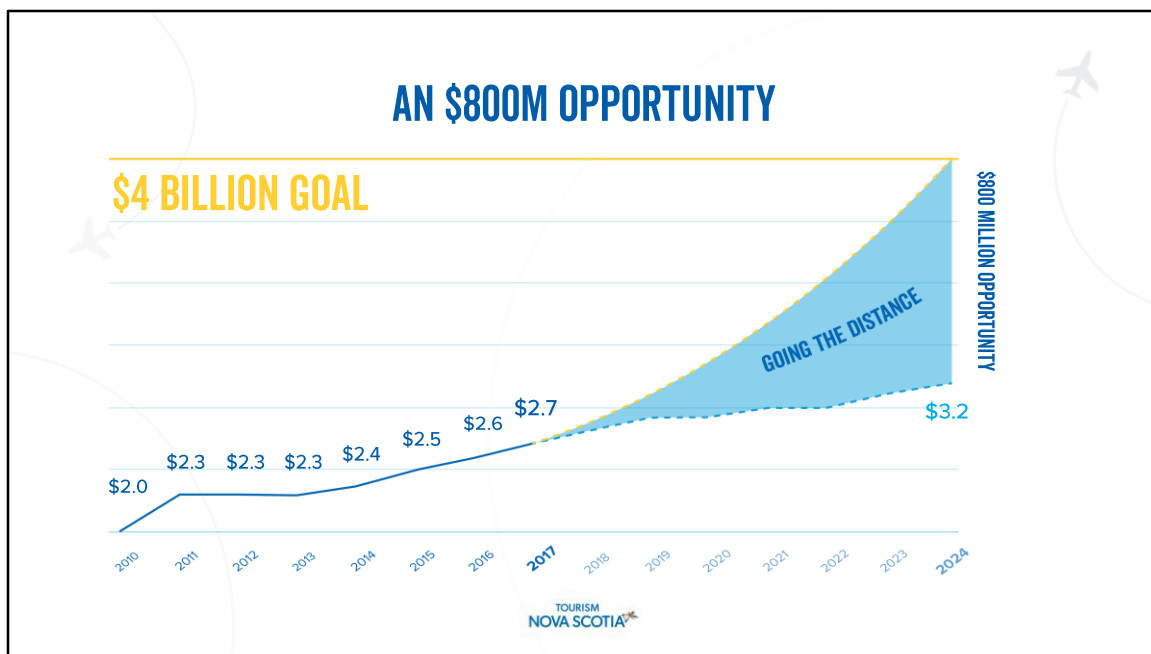
Nova Scotia has had four consecutive years of growth and two record-breaking years in a row. After the success of Canada 150 last year, visitation growth has moderated in 2018. We won't have full year results until February, but as of September, visitation is down 0.4% compared to the same period in 2017.

2018 has been a great year – in fact, as of September we've welcomed **almost two million non-resident visitors**, which is 9% more than in 2016. But, we cannot rely on the positive conditions we've seen in the last four years to carry us through to our \$4B goal.



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My team has however done some modelling to see where we'll be by 2024 if we continue as is, without making changes.



Tourism revenues are likely to reach \$3.2 billion.

That's \$800 million short of our goal. \$800 million dollars that Nova Scotia businesses and communities will miss out on.

At Tourism Nova Scotia, we see this as an \$800 million opportunity for our industry to further up our game, innovate and tackle the challenges standing between us and the \$4 billion goal head on.



There are several areas of opportunity, that if approached in a deliberate and collaborative way, will dramatically increase our ability to reach \$4B. My team and I call them the game-changers.

First and foremost, it will take more **marketing investment** to build interest in Nova Scotia as a vacation destination. While our marketing campaigns for the past several years have performed above industry standards, we need to reach more people in our key markets to attract the volume and type of visitors required to increase revenues.

We need **more direct flights** from priority markets to make it easy for people to get here.

We need **more accommodations supply and more quality accommodation options** that appeal to the higher-spending visitors we are targeting.

**Extending the tourism season** is another game-changer essential for business viability and sustainable tourism growth in Nova Scotia. We know that currently, visitors to Nova Scotia from further away markets are not that into us as an off-peak destination, but we also know that demand needs to be created to ensure operators can stay open year-round. We need communities and operators to work together to develop experiences and events with local and regional markets in mind. These are the markets that will be most willing to travel to off-peak events and activities. We

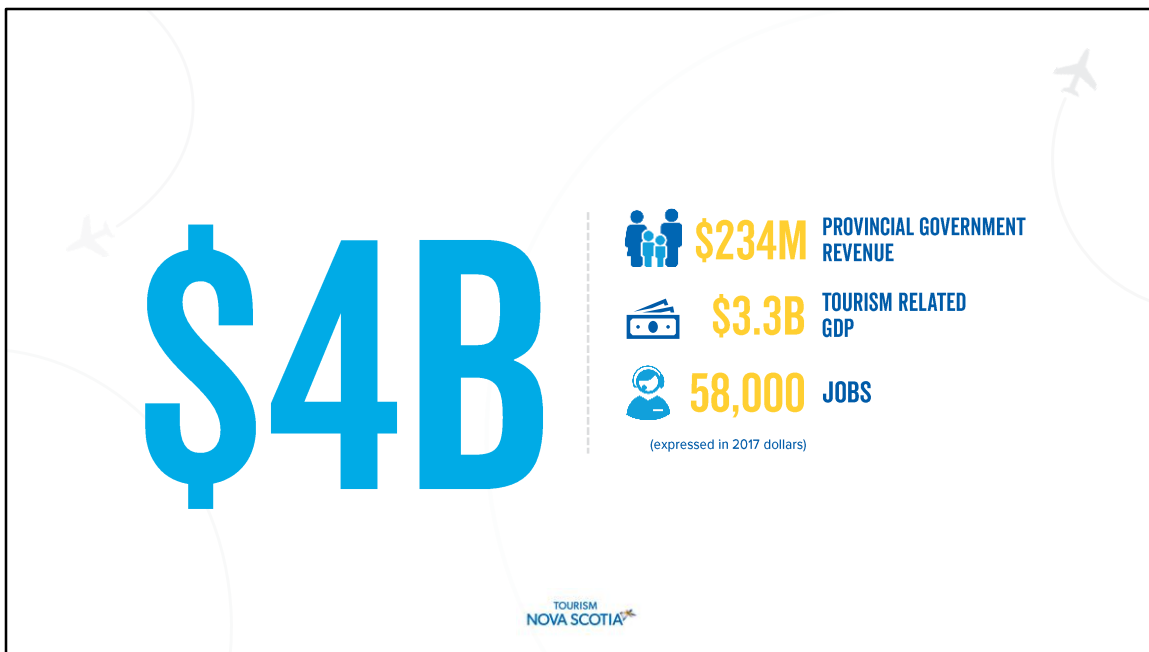
also know that there are events and experiences that have the potential to attract visitors from our target markets. In 2019, Tourism Nova Scotia will test shoulder and winter season experience concepts to understand their ability to motivate travel to Nova Scotia.

**China** is also a game-changer for Nova Scotia. It's the fastest growing inbound market for Canada. There is a significant opportunity for Nova Scotia to be the next new "hot spot" for Chinese visitors coming to Canada. By 2024, the goal is to have 50,000 visitors from China each year; improved air access and more China-ready operators are necessary to achieve this.

I've been to China many times – actually I was just there on a trade mission with the Premier last week. There is so much interest in what we have to offer here in NS – the clean air, the ocean, the wonderful seafood, the fall foliage. What seems to intrigue them the most is the idea of being able to see the stars in our skies – something so very simple. It's important to really learn what resonates with different visitors. Things we take for granted as Nova Scotians are awe-inspiring for others and can be the basis for incredible new experiences that we can sell.

The last game-changer is **labour**. We know many businesses and organizations have challenges attracting and retaining employees due to both a general shortage of labour across the province and the seasonal nature of tourism. Addressing labour shortages is essential to our industry's ability to grow. TIANS and the Nova Scotia Tourism Human Resource Council are working hard to lead this effort on behalf of our industry.

So, if we meet all of these opportunities, make the changes we need to make, and reach our \$4 billion revenue goal, what will that mean for Nova Scotia?



We asked Department of Finance and Treasury Board to tell us what \$4 billion dollars in tourism revenues might look like in terms of jobs, GDP, and provincial revenues. If 2017 tourism spending patterns scaled up to meet this ambitious target, the impacts would be significant. \$4 billion in tourism revenues could mean:

**\$234 million in provincial government revenues;**

**\$3.3 billion in tourism-related GDP; and**  
**more than 58,000 jobs.**

Okay, I'm almost finished...well, maybe not... but I want to quickly share a few examples of what "going the distance" looks like across our industry.

There are no shortage of businesses doing amazing things, but today I'm going to share what our World Class Experience EXCELLerator Program participants have been up to this year.



World-class experiences connect visitors in an authentic way with our culture, heritage, terroir and coastal landscapes. They generate a buzz and build on Nova Scotia's cachet as a vacation destination.

Through the World Class Experience EXCELLerator program, Tourism Nova Scotia's experience development team works with businesses to create new experiences at an accelerated pace. We provide the research, and we coach partners as they design and develop their experiences. We then capture the experiences through photography and video to help promote them to visitors.

Since we first launched the EXCELLerator program in 2016, we've teamed up with industry to create 29 awesome new experiences. In 2018, we're working with 7 operators. Here's a sneak peek at the experiences they'll be offering next year.



For this experience, you can hike Kejimikujik Seaside (I have to say I feel like a real local now that I can actually pronounce that!) to explore the beach with your very own Parks Canada expert. Then, take a guided kayak tour, savour a lobster roll picnic, go for a swim and return to the luxurious Quarterdeck Resort for a seafood dinner feast! I recently spent a night at the Quarterdeck and it was gorgeous. What an incredible seaside setting!



This chef-hosted culinary getaway at Nova Scotia's 5-star resort showcases local ingredients at three private coastal dining venues - an oyster bar on the beach, a gourmet vineyard dinner, a seafood feast beside a lighthouse, paired with a side of kayaking and fly-fishing. Sounds amazing doesn't it? Fox Harb'r is always outstanding.



This experience offers a thrilling helicopter journey from Halifax Harbour to Sambro Island. You can explore the island, enjoying sommelier-led tastings, including Nova Scotia bubbly on a beach and a picnic of local flavours beside the Sambro Island Lighthouse. Take in all the must-see sights of Halifax and our magnificent coast from the air. I really want to do this one.



This tour allows you to take in the colours and characters of Old Town Lunenburg UNESCO World Heritage Site as you explore by foot and by boat to discover Ironworks Distillery's award-winning rum, and enjoy an exclusive gourmet dinner from the top deck of the Theresa E. Connor, the sister schooner to the *Bluenose*.



# LA SOCIÉTÉ PROMOTION DE GRAND PRÉ

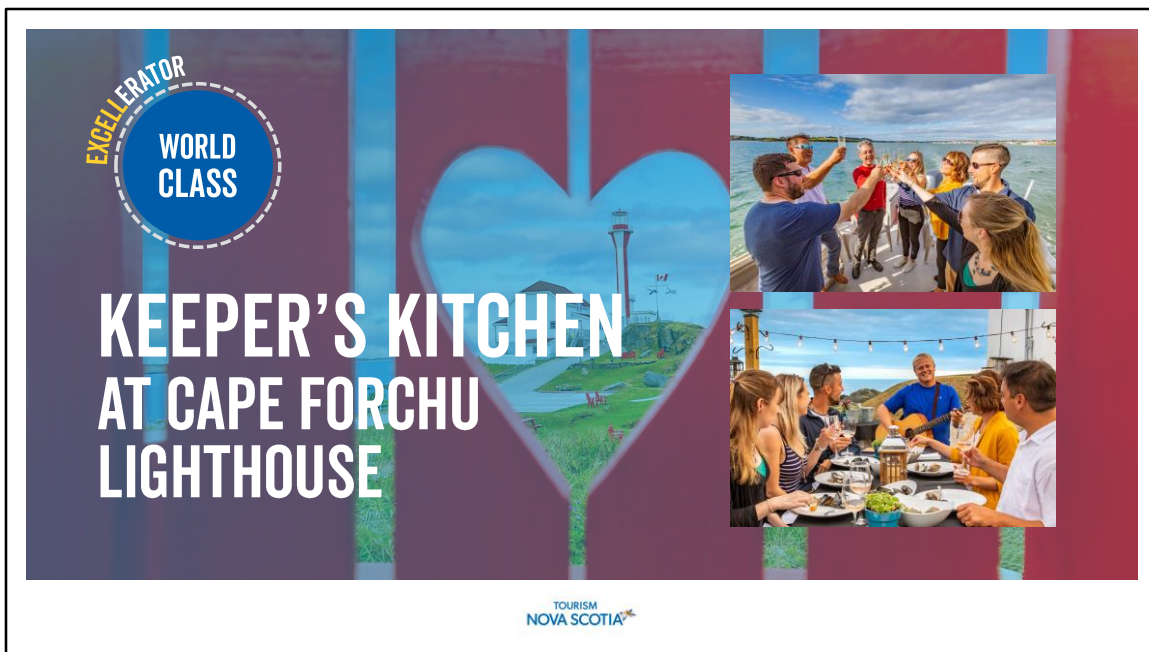


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Guests can savour a gourmet, farm-to-table culinary experience in the landscape of Grand Pré UNESCO World Heritage Site on the iconic Bay of Fundy. Hear stories of Nova Scotia's Acadian culture, while connecting with local chefs, wine makers and Nova Scotia's award-winning flavours. Wow – this experience captures all the senses!



If you're all about crisp-white wines shaped by the sea (and hey who isn't?), you'll love diving into the flavours of our Tidal Bay wine. Hosted by Avondale Sky's winemaker, tour the vineyard then head behind-the-scenes to the wine-lab to create your signature blend. Savour tastings and your chef-prepared dinner in a private vineyard home. This one sounds like a ton of fun to me.



Hear local stories and live tunes, while sampling seafood and toasting Nova Scotia wine on a boat tour of Yarmouth's coast. Arriving at Cape Forchu Lighthouse, savour a sunset lobster feast, topped by a tour of the night sky. I know this one would hold considerable appeal with our Chinese visitors!

Communities are also going the distance to maximize the tourism opportunity in their regions

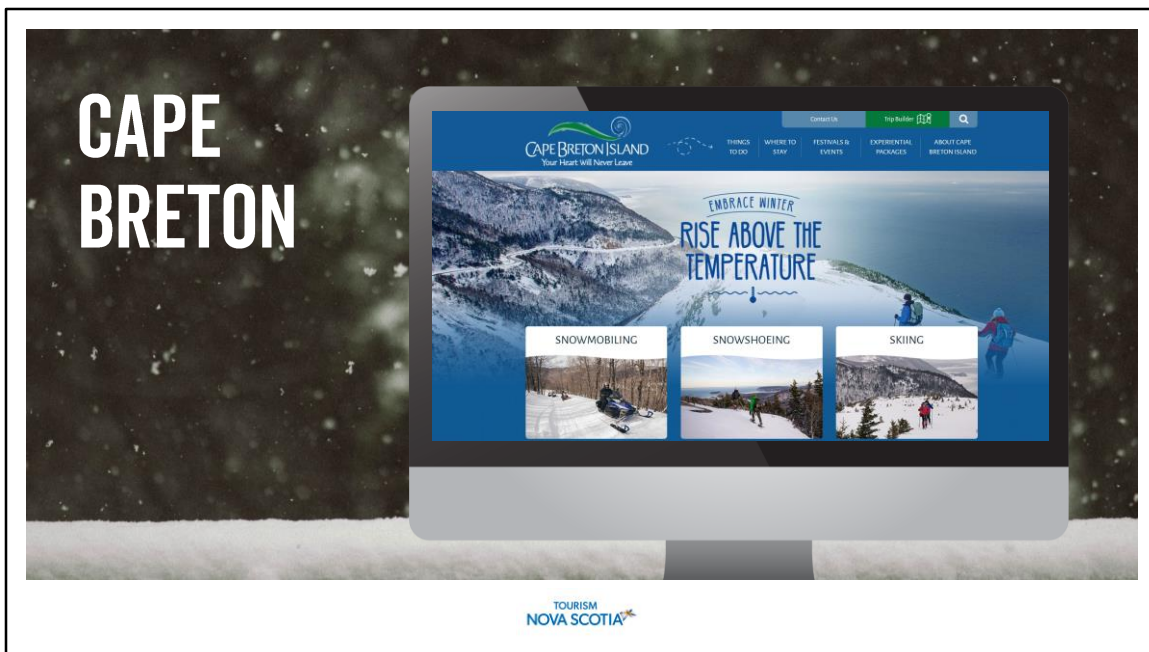
# SOUTH SHORE TOURISM COOPERATIVE



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For example, the South Shore Tourism Cooperative. Through events like the annual Lobster Crawl and Christmas Crawl, complete with a weather predicting Lucy the Lobster (which I just love – so very clever), the South Shore Tourism Cooperative is working to draw visitors during the winter months (sorry Donna Hatt, I meant Lobster Season – we don't use the dirty winter word anymore) and extend the tourism season as a whole. By engaging businesses throughout the region and encouraging them to enhance their offerings, the Cooperative is helping to motivate people to travel along the South Shore all year long.

The South Shore is doing exactly what we at Tourism Nova Scotia discuss in our strategy – they are embracing the challenge of seasonality and working hard on the regional market while we focus on export markets further away.



Kudos also to Cape Breton for tackling the seasonality challenge with a 2019 winter tourism campaign! Bring on the snow!

I'd like to take the opportunity to thank Mary Tulle for everything she has done to advance the tourism industry on Cape Breton Island. Mary has announced she's passing her Destination Cape Breton torch and we wish her all the best.

# CUMBERLAND COUNTY TOURISM STRATEGY



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Municipalities and tourism operators in Cumberland County have come together to develop a destination plan to further build on their strengths and attract visitors to their region. They've identified their target travellers, inventoried the attractions and are focusing on what motivates people to visit, with a goal of growing tourism in their region.

# YARMOUTH AND ACADIAN SHORES



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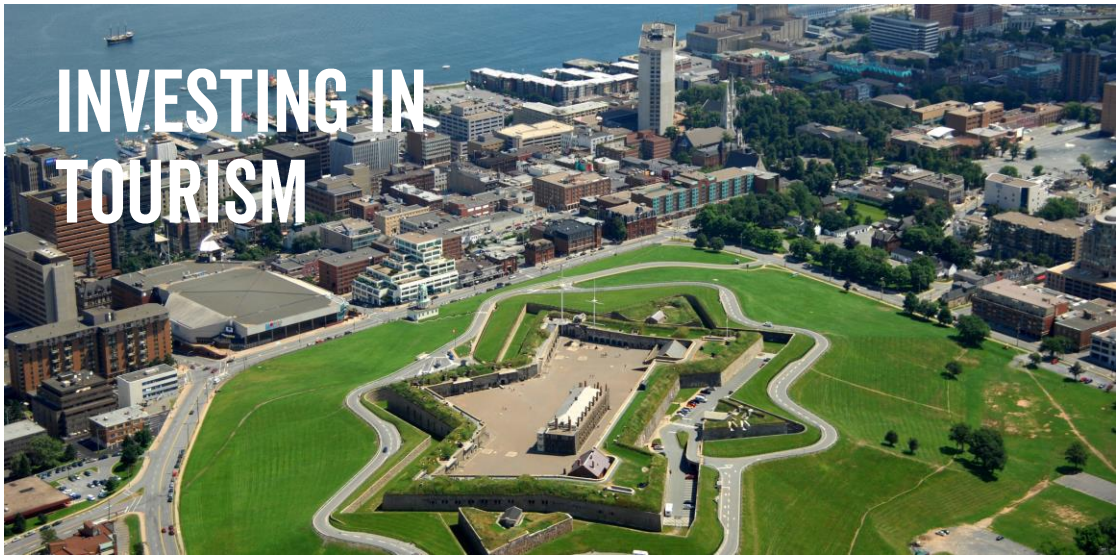
The Yarmouth community has really leveraged the opportunity presented by the international ferry link. Knowing they make a critical first impression when visitors get off the ferry, the Town of Yarmouth has participated in a streetscaping and façade program. New accommodations, new tour operators and new experiences are now available. Yarmouth & Acadian Shores Association has released a new destination management plan to grow tourism in the region. Here's a look at what the community of Yarmouth has been up to. They're a great example of what communities can accomplish.



Yarmouth and Acadian Shores – Go the Distance

Video link: <https://www.youtube.com/watch?v=rZCsJhY48eA&t=11s>

# INVESTING IN TOURISM



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The federal government continues to demonstrate its commitment to tourism. On November 12<sup>th</sup>, the federal Minister of Tourism announced the creation of an Advisory Council on Jobs and the Visitor Economy to help guide the development of a federal tourism strategy.

Here in Nova Scotia, Parks Canada is investing significantly in infrastructure and new visitor experiences at its sites throughout the province.

As well, the Atlantic Canada Opportunities Agency continues to invest in regional destination development plans and projects and tourism infrastructure enhancements. ACOA also invests in international marketing campaigns through the Atlantic Canada Agreement on Tourism.

## NOVA SCOTIA'S TOURISM ICONS



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At the provincial level, government is investing \$6 million dollars to enhance five iconic tourism sites. The iconic sites are: Peggy's Cove, Bay of Fundy including Annapolis Royal, the Cabot Trail, the Halifax waterfront, and the Lunenburg waterfront.

We know through research that these icons motivate people to visit Nova Scotia. Once they're here, they travel throughout the province leaving their dollars in your communities.

Investing in infrastructure improvements at these iconic locations will improve the visitor experience and create more opportunities for the private sector to develop world class experiences and increase visitor spending.

And as for Tourism Nova Scotia, we're the organization that literally "goes the distance" with our advertising campaigns and business development efforts to attract visitors to Nova Scotia.



We promote Nova Scotia as a vacation destination in Quebec, Ontario, Northeastern United States, the United Kingdom, Germany and China. Our strategy and tactics differ depending on the market – and of course, depending on budget!

This year, to give you more insight into our international markets and how we work in those markets, we’ve invited our in-market representatives from China, Germany, and the United Kingdom, to join us for a panel discussion. I’ve also asked Joann Fitzgerald, Tourism Nova Scotia’s Chief Marketing Officer to join us to share information about the Northeastern United States and how our approach differs there compared to our overseas markets.

Our in-market representatives are an extension of our Tourism Nova Scotia team. They are experts in their markets. They’re our boots on the ground. They speak the language (or have the right accents), they know the tour operators and travel media and influencers in their countries. They sell Nova Scotia with the same passion as we all do, and we’re thrilled to have them with us today.



As I mentioned earlier in my presentation, we must attract more visitors from these markets to reach our \$4 billion goal, and we're so pleased to have you on-board to help us with that.

Outside the room, members of the Tourism Nova Scotia team will be handing out market plans for each of Tourism Nova Scotia's target markets. The plans include key facts and information about our activities, as well as a summary of opportunities available to you.

If you have a chance to attend the international market concurrent session tomorrow morning, I'd highly recommend it. Our in-market representatives and members of Tourism Nova Scotia will be there to provide a deeper dive into the profile of the Chinese, German and UK traveller. They will discuss how to ready your business to best serve visitors from key international markets and provide more information on Tourism Nova Scotia's business resources.

Thanks so much everyone. Let's continue to do amazing things and go the distance to reach our goal!