

TOURISM
NOVA SCOTIA 



TOURISM NOVA SCOTIA

BUSINESS PLAN

2020-2021

CONTENTS

MESSAGE FROM THE CHAIR & CEO3

MANDATE.....4

MISSION4

VISION4

GOVERNANCE.....4

TOURISM NOVA SCOTIA.....5

 Strategic Pillars.....5

 Stakeholder Alignment6

 Planning Context: Strategic Game Changers7

2020-21 KEY ACTIVITIES8

OUTCOMES AND PERFORMANCE MEASURES14

OPERATING BUDGET17



MESSAGE FROM THE CHAIR & CEO

Globally, tourism is a significant driver of economic growth. Here in Nova Scotia, the provincial government recognizes Nova Scotia's tourism potential and the benefits of a robust tourism industry, making it a key part of its inclusive economic growth strategy. Tourism offers diverse business and employment opportunities for Nova Scotians in every region of the province and is uniquely positioned to create employment opportunities for under-represented groups in the province. Reflective of the importance of the tourism industry, we're seeing government invest in more direct flights from important markets like Europe, China and the United States; the strategic development of Nova Scotia's most iconic tourism sites; and infrastructure improvements in areas such as rural internet.

Tourism Nova Scotia is focused on attracting leisure visitors to Nova Scotia. We promote the province as a vacation destination in key markets beyond Atlantic Canada and we partner with tourism businesses and communities to develop experiences that capture the attention of travellers. Tourism Nova Scotia does not do this alone. There are many organizations and businesses working to strengthen the tourism industry in the province, and together we're striving to reach the Ivany Commission's goal of \$4 billion in tourism revenues by 2024. We've achieved remarkable increases in visitation and revenue in recent years, however, collaborative action toward several "strategic game-changer" opportunities will be essential for continued growth. We must own our roles and work to increase the quality and supply of accommodations throughout the province; extend the tourism season; address labour challenges; grow visitation from China; invest more in tourism marketing; and expand air capacity. More deliberate and targeted efforts are needed in order to reach the \$4 billion by 2024 goal.

In addition to helping to advance the "strategic game changer" opportunities, Tourism Nova Scotia's priorities in 2020-21 include the creation of the annual marketing campaign and partnerships with Destination Canada as well as our fellow Atlantic Canadian provinces through the Atlantic Canada Agreement on Tourism collaboration. We will continue to co-invest with tourism businesses and organizations to reach more potential visitors through our Digital Content Marketing and travel media programs. Through our award-winning World-class Experience EXCELLerator Program, our experience development team will work with businesses to grow our inventory of visitor experiences that get media and influencers talking, and ultimately inspire people to travel to Nova Scotia.

We know that to be competitive in a rapidly changing environment, tourism businesses must adapt and evolve. Our business development unit will work with new and existing businesses to ensure they are set up for success as market demands evolve. We will also continue to work with our colleagues across provincial government departments and Crown corporations to advance initiatives that contribute to the growth and sustainability of Nova Scotia's tourism industry.

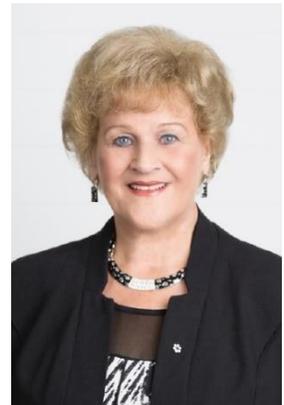
In 2020-21, we will also share 2019 Visitor Exit Survey results, which provide valuable insights about visitors to the province.

As always, we will embody our corporate vision to be recognized globally as the leading destination marketing organization.

Sincerely,

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

Michele Saran, CEO, Tourism Nova Scotia



R. Irene d'Entremont,
Chair, Tourism Nova Scotia



Michele Saran,
CEO, Tourism Nova Scotia

MANDATE

The Tourism Nova Scotia Act, passed on May 4, 2015, identifies the following objects of the corporation:

- achieve tourism growth in the province and maximize the value of tourism to the economy of the province;
- develop and implement a long-term strategy for tourism to drive sustainable tourism in the province that delivers growth and profitability in the tourism industry, provides economic benefit to the province, and is consistent with the province's strategic priorities; and
- communicate and collaborate with communities, private industry, and the tourism industry in the province.

MISSION

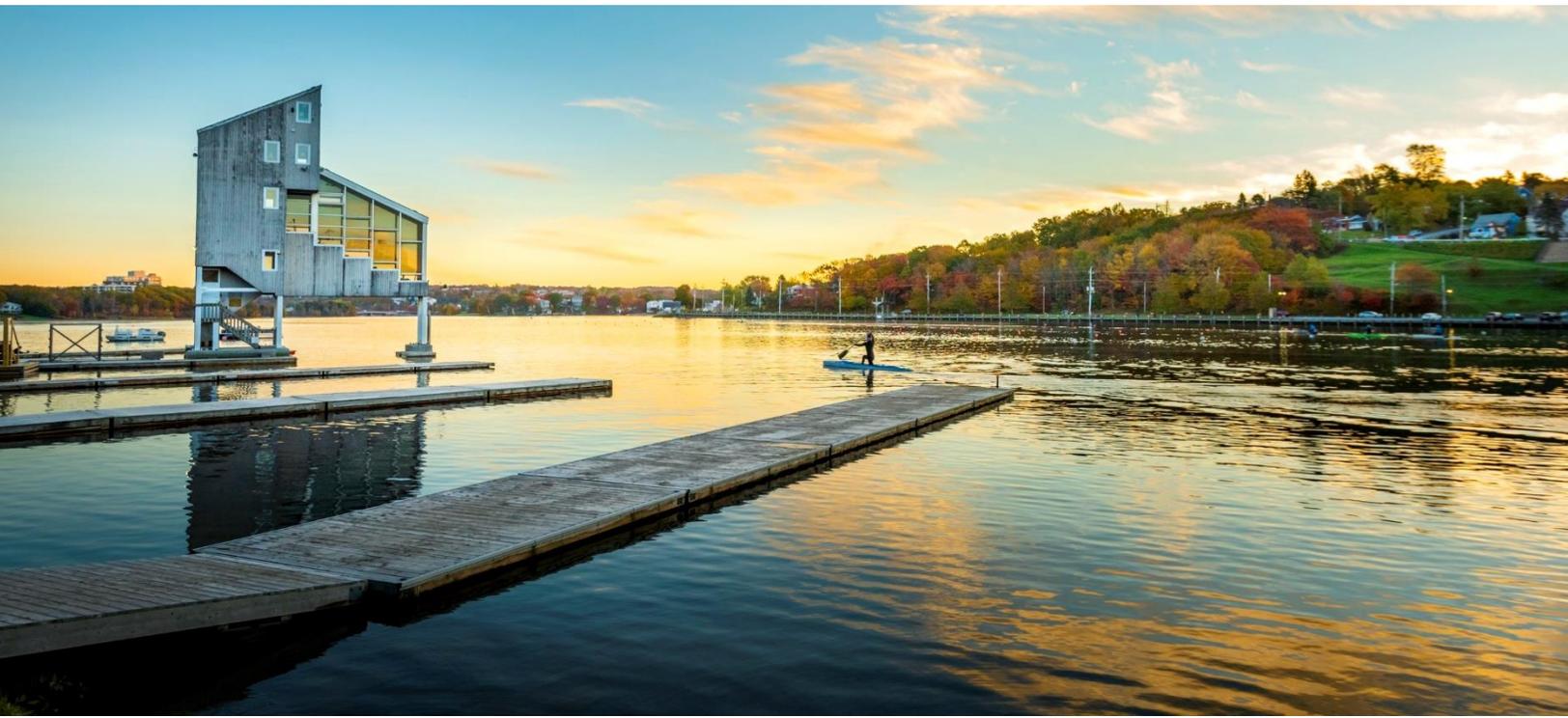
To market Nova Scotia's tourism experience to the world through innovation and collaboration.

VISION

To be recognized globally as the leading destination marketing organization.

GOVERNANCE

Tourism Nova Scotia is led by a private sector board of directors consisting of industry and business leaders from across Nova Scotia. Directors are elected to the board based on a nomination process. Tourism Nova Scotia's Chief Executive Officer reports to the Chair of the board of directors. The Chair reports to the Minister of Business.





TOURISM NOVA SCOTIA

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

Tourism Nova Scotia's five-year strategic plan, "Driving Export Revenue", was first released in 2017 and is updated annually. The strategic plan aligns with the provincial government's inclusive economic growth priority. The tourism industry is an important driver of export growth, and a vibrant tourism industry creates benefits for both rural and urban regions within Nova Scotia. This regional dispersion of benefits, coupled with the diversity of business and employment opportunities, supports inter-provincial migration, employment attachment and inclusion.

The provincial government's economic growth priorities inform Tourism Nova Scotia's strategic plan and underpin the corporation's 2020-21 business plan.

Strategic Pillars

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

1. Attract first-time visitors to Nova Scotia

While all visitors are important, Tourism Nova Scotia's advertising messages and execution focus on those who have not yet visited the province; specifically, the first-time pleasure visitor. First-time pleasure visitors spend more in Nova Scotia and are the most likely to be influenced by Tourism Nova Scotia's marketing activities.

2. Invest in markets of highest return

Tourism Nova Scotia invests its marketing dollars in markets that will attract the highest-value visitors to Nova Scotia.

3. Focus on world-class experiences

Tourism Nova Scotia leads tourism experience development and industry development through a "world-class" lens to support attracting first-time visitors to the province. Tourism Nova Scotia partners with the private sector to showcase and create experiences that align with the travel values and expectations of Nova Scotia's target travellers. It leverages the province's existing assets and icons to create new, purchasable experiences.

4. Build Nova Scotia's tourism confidence

Tourism Nova Scotia builds stakeholder knowledge of, and support for, its strategic direction to attract increased investment, grow revenues, and boost Nova Scotia's tourism confidence.



Stakeholder Alignment

Achieving Nova Scotia’s ambitious tourism revenue goal requires all stakeholders to align with the goal and own their roles.

Industry (Tourism Operators and Businesses)

Industry roles include:

- investing in product to provide the types of purchasable, world-class experiences that travellers want;
- closing the sale pre-trip and during-trip; and
- exceeding visitor expectations to drive repeat visitation and lead visitors to recommend Nova Scotia to others.

Community

Community is defined as municipalities, regional/community destination marketing organizations, and regional tourism industry associations. Community also includes all Nova Scotia residents. Community roles include:

- partnering with industry on destination development and marketing;
- engaging in positive interactions with visitors that influence them to return and recommend Nova Scotia as a vacation destination;
- helping residents understand the value of tourism; and
- providing visitor servicing.

Government (Federal and Provincial)

Government enables tourism growth by considering policies and investments in programs and infrastructure that will improve the operating environment for tourism businesses and increase Nova Scotia’s competitiveness as a tourism destination. Government roles include:

- community economic development;
- attraction of inward investment; and
- infrastructure development.

Other Key Stakeholders

The Tourism Industry Association of Nova Scotia (TIANS) acts as the “voice of tourism” to advocate for and lead the advancement of the tourism industry.

The Nova Scotia Tourism Human Resource Council promotes and supports the development of a skilled and professional workforce for Nova Scotia’s tourism industry.

Planning Context: Strategic Game Changers

Following four years of strong visitation growth between 2014 and 2017 and the province's highest recorded tourism revenues in 2018, tourism visitation and associated revenues have declined in 2019. If current conditions continue, tourism revenues are anticipated to reach only \$2.8 billion in 2024. To attain the \$4 billion revenue goal, more must be done. Tourism Nova Scotia has identified six (6) "strategic game changer" growth opportunities that tourism industry stakeholders must embrace and address collectively to create the conditions for continued growth in visitation and associated tourism spending. More information on the "strategic game changers" can be found in Tourism Nova Scotia's strategy, "Driving Export Revenue".

1. Accommodations

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

2. Seasonality

Nova Scotia is typically not viewed by travellers as a year-round destination and has limited visitor experiences and product offerings outside the peak months. Extending the tourism season through the development of products and visitor experiences that are available during off-peak months is a key opportunity to diversify and grow Nova Scotia's tourism offerings and increase revenues.

3. Labour

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

4. China

Nova Scotia is well positioned to be the "next hotspot" for Chinese visitors coming to Canada. Businesses that understand the China market and adjust their offerings will be better equipped to attract and accommodate more visitors from China and provide memorable experiences that will lead to recommendations and repeat visitation.

5. Air capacity

Nova Scotia's highest spending visitors are those who arrive by air. Strategically improving air access to the province through direct flights will provide a significant opportunity to attract more high-value international visitors. In 2020, for the first time in the province's history, there will be two non-stop charter flights from Guangzhou, China to Halifax. The success of these flights and the accompanying travel packages is crucial to developing the potential for regularly scheduled direct flights beyond 2020.

6. Marketing investment

Achieving higher levels of visitation from key target markets will increasingly rely on marketing investment by all stakeholders in the tourism industry. Marketing is key to increasing awareness and generating interest in visiting Nova Scotia.

2020-21 KEY ACTIVITIES

The Province of Nova Scotia, as part of its inclusive economic growth goal, has embraced the Ivany Commission challenge to increase tourism revenues to \$4 billion by 2024. The tourism industry is important to every region of the province. Tourism is a strategic growth industry for Nova Scotia; a vibrant tourism industry provides business, employment, and quality of life benefits across the province.

In 2020-21, Tourism Nova Scotia will develop, invest in, and execute on initiatives that are aligned with provincial economic growth priorities and Tourism Nova Scotia's strategy to lead sustainable tourism growth in the province.

Lead Experience Development

Experience development is a strategic priority for Tourism Nova Scotia. The experience development process inspires tourism operators to innovate and embrace change to create unique and authentic Nova Scotia experiences that appeal to target markets and differentiate Nova Scotia as a vacation destination.

In 2020-21, Tourism Nova Scotia will partner with tourism operators through the World-class Experience EXCELLerator Program to develop experiences that will attract high-value visitors to the province. In 2020-21, the EXCELLerator program will, through collaboration with industry, expand to include the development of Indigenous, African Nova Scotian, and off-peak seasonal experiences.

EXCELLerator partners that have already developed experiences will be supported by coaching and mentoring to enhance their ability to market their experiences and attract visitors to Nova Scotia.

Tourism Nova Scotia will also work with tourism businesses, through strategic co-investment initiatives, to develop new products, improve market readiness, and enhance existing tourism products and experiences.



Target Key Markets with Consumer-focused Advertising Campaign

Each year, Tourism Nova Scotia develops and implements a consumer advertising campaign featuring TV, search engine marketing (SEM), social media ads, digital video, and digital display units. Each year, Tourism Nova Scotia evaluates and identifies media options best suited to tell the story of Nova Scotia to prospective visitors.

In 2020-21, the campaign will continue to target the Cultural Explorer and Authentic Experiencer Explorer Quotient® traveller segments in key geographic markets (see tourismns.ca for more information on Explorer Quotient®). The 2020-21 campaign continues the creative strategy to increase awareness of and interest in Nova Scotia as a vacation destination by highlighting the breadth of compelling experiences and activities in the province. The 2019-20 campaign performed very well in terms of generating interest and influencing travel to Nova Scotia.

New in 2020-21 will be a campaign targeting the Free Spirit traveller segment. This pilot campaign will be launched in the Ontario market and is expected to leverage the visual assets that have been developed through the award-winning World-class Experience EXCELLerator Program.

Engage Travel Influencers

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

Travel media marketplaces give provincial tourism operators the opportunity to meet with international travel media and influencers. In 2020-21, Tourism Nova Scotia will participate in *GoMedia*, Destination Canada's premier international media marketplace.

Leverage Strategic Partnerships to Extend Reach

Nova Scotia's tourism marketing reach will be extended through the following strategic initiatives with partners to align tourism marketing investments at a provincial, Atlantic, and national level.

- The Digital Content Marketing Program allows businesses and communities to co-invest with Tourism Nova Scotia to develop marketing assets and extend their reach through customized digital advertising and/or content asset development activities.
- Strategic co-investment partnerships with Destination Canada to leverage Destination Canada's scale and reach across the direct-to-consumer, trade, and media channels in key international markets under the Canada brand, as well as a new domestic partnership, focusing on the Ontario market.
- Co-investment with the Atlantic Canada Opportunities Agency (ACOA) and the Atlantic provinces to extend reach in key international markets through direct-to-consumer advertising, media, and trade activities.

Develop Key Markets through Trade Marketing Initiatives

The travel trade strategy engages international inbound tour operators and travel agencies to extend Nova Scotia's tourism marketing reach and sales through product development, training, and partnership marketing.

This strategy is supported by in-market representatives in the UK, Germany, and China markets. The in-market representatives provide on-the-ground support to increase awareness of Nova Scotia as a vacation destination. They facilitate opportunities with travel trade (tour operators, travel agents), travel writers and influencers, and other partners (e.g., airlines, Destination Canada) in these target markets. Activities in 2020-21 include:

- attendance at business-to-business marketplaces;
- tour operator sales calls;
- media pitches;
- familiarization tours with tour operators and travel writers/influencers; and
- co-operative marketing partnerships.

Exposure to tour operators and travel agents from Nova Scotia's international markets offers provincial tourism businesses the opportunity to extend their reach in key target markets. Tourism Nova Scotia facilitates this important exposure to the international travel trade. Key 2020-21 initiatives include participation in *Rendez-vous Canada* and conducting Nova Scotia familiarization tours with international tour operators.

Leverage International Air Access

Air access is key to attracting international visitors to the province. Nova Scotia's highest-spending visitors are those who arrive by air. Nova Scotia has a strong competitive advantage within Atlantic Canada to attract international flights, as Halifax Stanfield International Airport is the area's largest airport and the regional gateway hub of Atlantic Canada. 2020-21 marketing activities will help increase awareness and consideration of Nova Scotia as a vacation destination in strategic air markets. Tourism Nova Scotia will continue to work with Halifax International Airport Authority to influence International Air Service Investment Fund market selection.

In 2020-21, Tourism Nova Scotia will support the new direct charter flights from China with dedicated marketing activities to increase awareness of Nova Scotia and generate interest in the route.



Enhance Tourism Operator Export Readiness

Quality is a critical success factor for Nova Scotia's tourism industry. Tourism operators that work to provide the highest quality product and service will stand out from the competition. Tourism Nova Scotia is committed to working with operators to improve their competitiveness and enhance their ability to attract high-value visitors and meet visitor expectations.

Following the repeal of the Tourist Accommodations Act, Tourism Nova Scotia will redirect business development resources to focus on improving the competitiveness of Nova Scotia's tourism operators. Tourism Nova Scotia will work with tourism operators and other stakeholders including, but not limited to TIANS, regional organizations and associations, and other federal/provincial partners, to elevate the quality of product and experiences that are offered to visitors. There are several initiatives to support Tourism Export Readiness.

- Research to identify the best opportunities for tourism operators to improve quality of the visitor offering.
- Development of a program that will recognize and promote tourism operators in Nova Scotia that exemplify excellence as defined by visitors.
- Export Readiness Coaching pilot initiative to provide one-on-one business coaching with up to 15 tourism operators who have completed the introductory "Travel Trade Readiness" workshop to advance them to export ready status to be able to work with international travel trade.
- Increasing industry's technology capacity through website incubator workshops.
- Cost-sharing projects with other Atlantic provinces and ACOA to increase capacity and readiness of Indigenous tourism operators.
- Quality Enhancement pilot initiative aimed at enhancing quality across the tourism industry, focussing on elevating quality standards through workshops/assessments that provide advice on consumer trends and overall opportunities for quality improvement.
- Collaboration with Nova Scotia Business Inc. to support investment attraction within the tourism industry with a focus on accommodations.

Tourism growth will require increasing the supply of qualified labour. In 2020-21, Tourism Nova Scotia will support the Nova Scotia Tourism Human Resource Council, whose role is to promote and support the development of a skilled and professional workforce for Nova Scotia's tourism industry.

Invest in Key Tourism Sites

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

In 2020-21, investments will be made through strategic partnerships, working in collaboration with Develop Nova Scotia and other partners, to support planning and infrastructure improvements in these iconic tourism sites. Where possible, program investments will leverage partner funds and federal, provincial, and municipal funding.

Build Nova Scotia's Tourism Confidence

Communications activities in 2020-21 will focus on enhancing stakeholder engagement and building Nova Scotia's tourism confidence. Tourism Nova Scotia will continue to provide strong leadership to achieve role clarity, reduce duplication, foster stakeholder alignment with Tourism Nova Scotia's strategy, and facilitate action on the "strategic game changer" opportunities. Rallying the tourism industry to embrace change and opportunities is key to reaching the \$4 billion goal.

Tourism Nova Scotia's stakeholder outreach initiatives encourages industry, all levels of government, and other tourism stakeholders, including TIANS and industry associations to align with the tourism strategy and invest in visitor products, experiences, infrastructure, and community development initiatives that will create the conditions for ongoing tourism growth. Tourism Nova Scotia also informs, engages, and inspires Nova Scotians to be proud of who we are as a tourism destination.

Communications activities in 2020-21 include:

- building on 2019-20's successful "Nova Scotia Unlisted" campaign, 2020-21 will feature a communications campaign to inspire Nova Scotians to feel proud of what Nova Scotia offers as a vacation destination, and to be confident and excited about opportunities that exist for Nova Scotians within the tourism industry;
- leading industry and stakeholder information sessions to encourage alignment with the strategy and rally industry and stakeholders to action the "strategic game changers" that are key to reaching the \$4 billion goal;
- regular articles in Tourism Nova Scotia's blog/newsletter, inTouch, to inform tourism operators about business development and promotional opportunities;
- proactive social and traditional media outreach to share information and celebrate industry successes;
- monthly reporting of tourism performance indicators, culminating with a year-in-review announcement of overall 2020 tourism performance and progress against the \$4 billion goal.

Tourism Nova Scotia's corporate website, tourismns.ca, will continue to be the primary source of information for industry, featuring timely and relevant news, advertising opportunities, industry partnership programs, and tourism performance indicators.

Conduct Research to Inform Strategic Decisions

Tourism Nova Scotia conducts research to inform and support key marketing, industry development and communications initiatives. Key activities for 2020-21 include:

- development of key tourism indicators, including visitation estimates;
- advertising campaign evaluation research;
- research to inform and support increasing provincial; tourism operators' ability to adapt to changing consumer behaviour; and
- experience development concept testing.

In 2020-21, Tourism Nova Scotia will analyse and share information from 2019's Visitor Exit Survey. The Visitor Exit Survey is the most comprehensive survey of visitors to Nova Scotia. It provides a detailed profile of visitors, including purpose of trip, travel party composition, types of accommodations used, participation in activities, spending, and community visitation.

Identify and Capture Alternative Sources of Revenue to Fund Tourism Nova Scotia Marketing Initiatives

Increased investment in marketing is critical to ongoing tourism growth in Nova Scotia. In 2020-21, Tourism Nova Scotia will launch a pilot initiative focussed on attracting incremental marketing investment from non-traditional sources through sponsorship and partnership activities. The pilot will be administered by Tourism Nova Scotia's advertising agency of record and will focus on identifying sources of revenues to support Tourism Nova Scotia's marketing activities.

The pilot will be assessed at the end of the year, with recommendations for future implementation.

Other Responsibilities/Services

In addition to the key 2020-21 activities that align with Tourism Nova Scotia's mandate and strategy, Tourism Nova Scotia provides support to the tourism industry in the following areas:

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



OUTCOMES AND PERFORMANCE MEASURES

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

It is important to note that Tourism Nova Scotia does not directly influence *all* visitation to Nova Scotia or resulting visitor expenditures, and performance is assessed against outcomes that are directly related to Tourism Nova Scotia initiatives.

Outcome: Increase visitation and tourism spending through strategic marketing activities

Tourism Nova Scotia's annual advertising campaign influences visitation to Nova Scotia from key target markets. In 2019, Tourism Nova Scotia commissioned an advertising return on investment (ROI) study. This study estimated that for each \$1 invested in media buy in Tourism Nova Scotia's target markets, visitation influenced by the campaign generated \$21 in tourism spending in Nova Scotia, and \$3.14 in HST, a strong result for the 2019 campaign.

A strong campaign is one that delivers at least \$2 in HST for each \$1 invested in media buy.

In 2020-21, Tourism Nova Scotia will work to support and increase the strong level of tourism spending and resulting taxes influenced by the annual advertising campaign.

Outcome: Infrastructure improvements to create opportunities for experience development

Tourism Nova Scotia is administering the Tourism Revitalization of Icons Program (TRIP). The program will enhance five iconic tourism sites: the Cabot Trail; Halifax waterfront; Lunenburg waterfront; Peggy's Cove; and the Bay of Fundy including Annapolis Royal.

In 2020-21, Tourism Nova Scotia will identify and review at least four projects to be assessed through the TRIP program criteria.

By the end of 2020-21, Tourism Nova Scotia will have coordinated or initiated the administration of \$6 million of infrastructure investment projects that align with TRIP objectives.

Outcome: World-class experiences that attract first-time visitors to Nova Scotia

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

In 2020-21, Tourism Nova Scotia will lead the development of 10 new world-class experiences, including Indigenous, African Nova Scotian, and off-peak seasonal experiences.

Outcome: Motivate tourism operators to excel and improve their competitiveness

Tourism Nova Scotia recognizes the importance of working with tourism businesses to address gaps and opportunities that will enhance their competitiveness.

In 2020-21, Tourism Nova Scotia will complete development of terms of reference for a program that recognizes and promotes tourism operators that exemplify excellence and will complete research and consultation to identify and implement at least two tourism business competitiveness initiatives that address current delivery gaps.

Outcome: Increase Nova Scotia’s tourism confidence

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

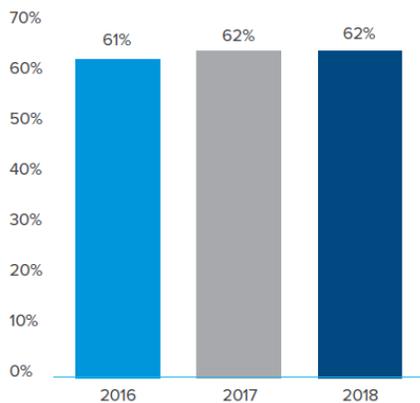
Tourism Nova Scotia offers and participates in several co-investment initiatives that extend reach in target markets. Co-investment with Tourism Nova Scotia is contingent upon the partner being confident that investing with Tourism Nova Scotia will lead to growth. In 2020-21, Tourism Nova Scotia will continue to build Nova Scotia’s tourism confidence by attracting and leveraging co-investment revenues from partners, including Nova Scotia tourism operators, Destination Canada, the Atlantic Provinces, ACOA, and Halifax International Airport Authority.

In 2020-21, Tourism Nova Scotia will attract at least \$1 in matching investment for each \$1 it co-invests with partners, a 1:1 leverage ratio.

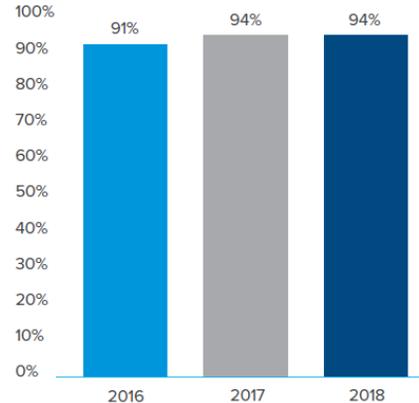
Each year, Tourism Nova Scotia assesses the perceived importance of the tourism industry to the provincial economy, and pride of place among Nova Scotians.

In 2020-21, Tourism Nova Scotia will work to support the already exceptionally strong recognition of the importance of, and pride in, the tourism industry among Nova Scotia residents.

**IMPORTANCE OF TOURISM TO THE PROVINCIAL ECONOMY
(% INDICATING 'CRITICALLY IMPORTANT')**



**I AM PROUD OF WHAT NOVA SCOTIA OFFERS TO VISITORS
(% AGREEING)**

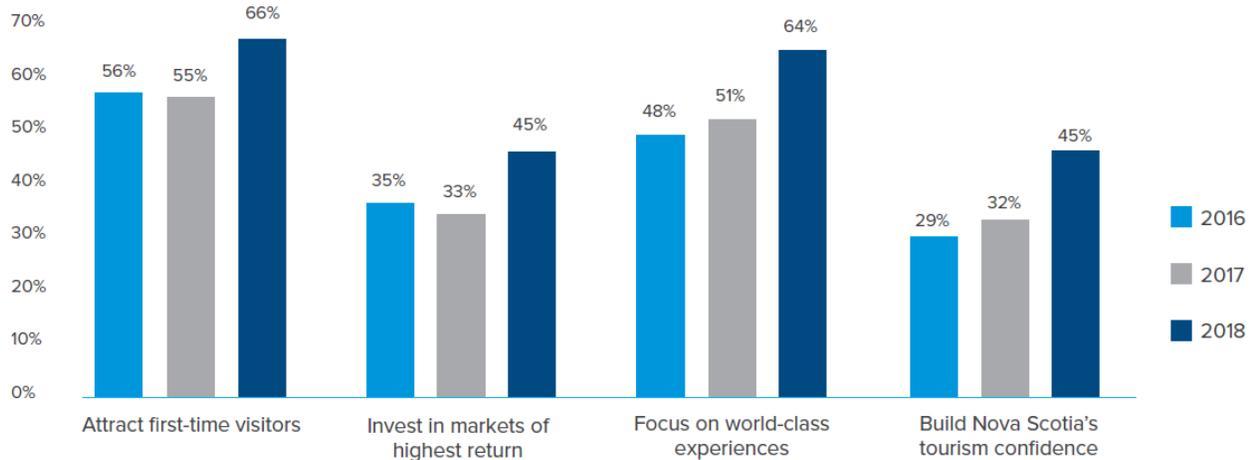


Source: Tourism Nova Scotia Annual Public Opinion Survey

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

In 2020-21, Tourism Nova Scotia will work to increase stakeholder familiarity with the tourism strategy.

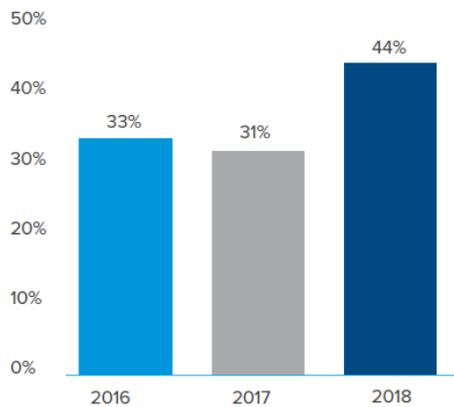
TOURISM STAKEHOLDER AWARENESS OF TOURISM NOVA SCOTIA'S STRATEGIC PILLARS
 (% INDICATING 'YES, AWARE')



Source: Tourism Nova Scotia Annual Stakeholder Survey

Tourism Nova Scotia will also work to increase stakeholder satisfaction with the corporation’s performance.

TOURISM STAKEHOLDER SATISFACTION WITH TOURISM NOVA SCOTIA'S PERFORMANCE
 (% RATING 8, 9, 10 ON 10-POINT SCALE)



Source: Tourism Nova Scotia Annual Stakeholder Survey

OPERATING BUDGET

	Estimate 2019-20 (\$)	Forecast 2019-20 (\$)	Estimate 2020-21 (\$)
Revenue			
Provincial Operating Grant	22,507,000	23,192,000	21,648,000
Tourism Recoveries	550,000	914,200	550,000
Tourism Fees & Charges	652,200	648,200	763,000
Total Revenue	23,709,200	24,754,400	22,961,000
Expenses			
CEO & Board Administration	363,400	373,000	372,100
Corporate Services	5,719,100	6,590,300	5,033,600
Communications	560,400	426,100	523,000
Research and Policy	1,052,300	1,045,200	1,069,400
Marketing	12,891,400	14,051,700	13,149,800
Sector Development	3,122,600	2,268,100	2,813,100
Total Expenses	23,709,200	24,754,400	22,961,000
Surplus (Deficit)	-	-	-