

COVID-19 PANDEMIC NS TOURISM RECOVERY

Research, Insights
& Tourism Nova Scotia's Marketing Approach

Prepared By Tourism Nova Scotia
For Distribution to Nova Scotia's Tourism Industry
April 28, 2020

INTRODUCTION

The following information has been prepared to provide tourism businesses and stakeholders with research and insights that show what tourism recovery could look like in Nova Scotia.

The COVID-19 pandemic has had a widespread impact on tourism businesses, related-organizations, events, and communities. Every tourism stakeholder faces a different challenge at this time. As Nova Scotia's tourism marketing and sector development organization, we are directing our resources towards programs, initiatives and marketing activities that will help Nova Scotia's tourism industry recover and rebuild. Our proposed marketing approach is included in this document. Please visit Tourism Nova Scotia's corporate web site, tourismns.ca or subscribe to [inTouch blog and newsletter](#) to learn about TNS activities and how we may be able to assist you.

The following information will be updated as the tourism operating environment changes.

If you have questions about this content, please contact:

TNScommunications@novascotia.ca

TOURISM RECOVERY RESEARCH & INSIGHTS

2020 RECOVERY POTENTIAL

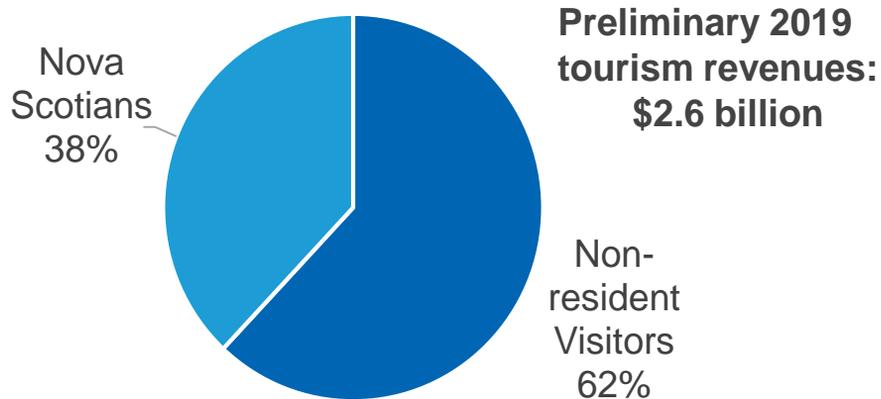
To better understand what COVID-19 tourism recovery might look like for Nova Scotia, Tourism Nova Scotia started by examining the tourism landscape pre-COVID-19. We looked at:

- Tourism revenues: who generates them, and how are they distributed throughout the year
- Where our visitors come from
- How our visitors get here
- Where our visitors go once they arrive

NOVA SCOTIA TOURISM REVENUES

The majority of Nova Scotia's tourism revenues are generated by non-resident visitors. 38% of tourism revenues come from spending by Nova Scotians travelling throughout the province. 62% of tourism revenues come from spending by non-residents.

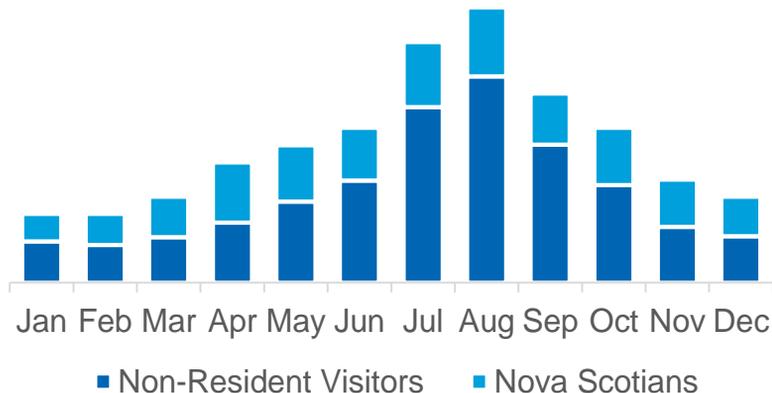
Tourism recovery will depend on how and when travel restrictions are eased. These factors will inform how, when and where Tourism Nova Scotia markets in 2020.



NOVA SCOTIA TOURISM REVENUES

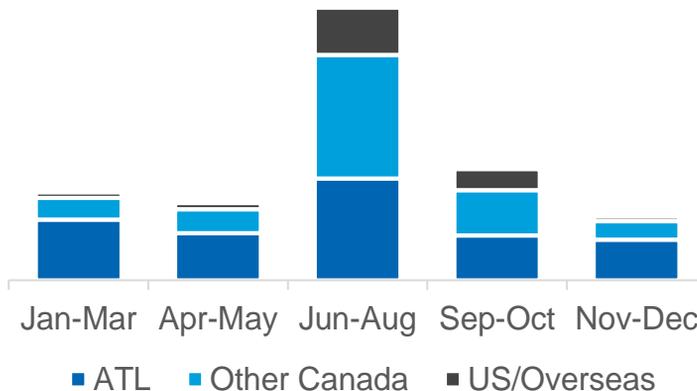
The chart below illustrates the distribution of tourism revenues over a full year. June and July account for 30% of annual tourism revenues; the June to October period accounts for 59%. During these peak months, non-resident visitors account for more than 70% of tourism revenues.

When and how travel restrictions are lifted, along with consumer willingness to travel, are key factors in Nova Scotia's tourism revenue potential.



NON-RESIDENT VISITORS: WHERE THEY COME FROM

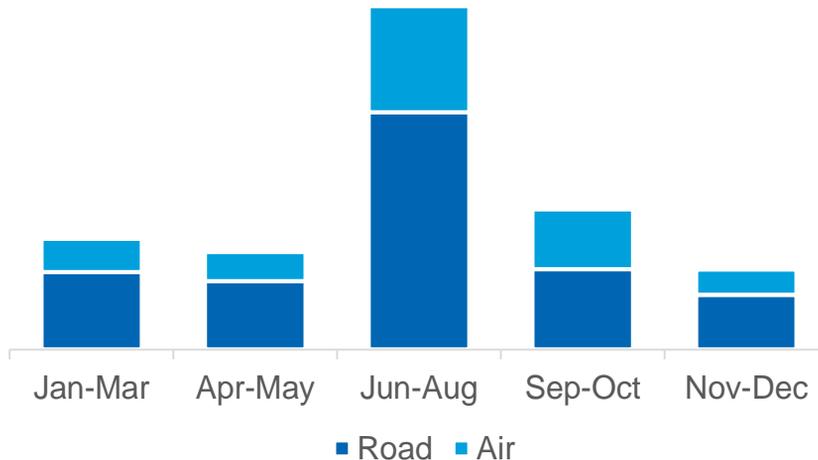
The chart below illustrates where non-resident visitors come from during the year. The June to October period is the most important time for visitation overall, including international visitors. International visitors account for 14% of non-resident visitors, but contribute 25% of tourism revenues from non-resident visitors. Where visitors come from is an important factor in tourism recovery.



Atlantic Canadians account for 48% of non-resident visitors, but only 24% of non-resident tourism revenues.

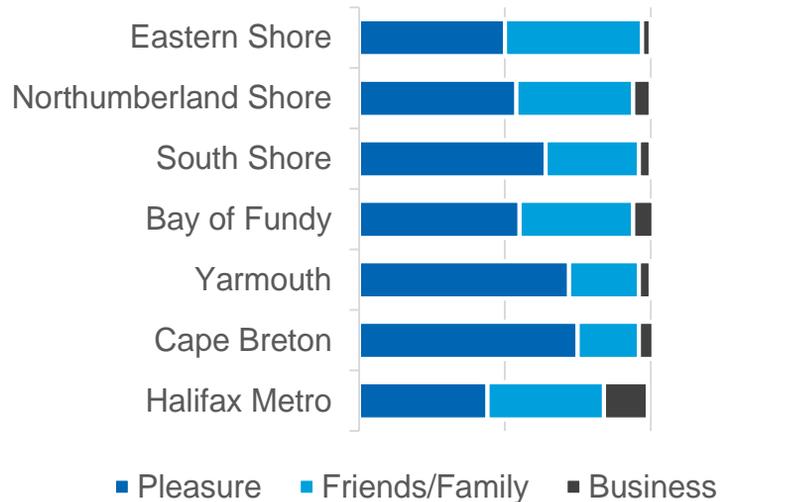
NON-RESIDENT VISITORS: HOW THEY GET HERE

The chart below illustrates how non-resident visitors travel to Nova Scotia. One-third of visitors arrive by air, therefore air capacity is another key factor in tourism recovery.



TOURISM REGION VISITATION

The chart below illustrates where pleasure visitors, business travellers, and those visiting friends and family generally go when they come to the province. The type of traveller Nova Scotia is able to attract during the recovery period will play a role in dispersion of visitors and spending across the province.



TOURISM RECOVERY OUTLOOK

2020 RECOVERY POTENTIAL

COVID-19 has had an immediate impact on Nova Scotia's tourism industry. March and April 2020 had little to no tourism activity.

Recovery will be gradual. The following are key factors in Nova Scotia's tourism recovery potential

- Virus is contained in Nova Scotia, Canada, and globally
- Physical distancing measures are removed
- Travel restrictions are lifted
- Tourism operators are able to open for business
- Travellers are willing to travel
- Air capacity to Nova Scotia improves
- Nova Scotians are willing to welcome visitors

2020 RECOVERY POTENTIAL

Outlook: local travel first

- Research indicates that travellers will start post-COVID travel locally
- Nova Scotians account for 38% of overall tourism revenues
- Based on current information, there is potential for local travel recovery in 2020

2020 RECOVERY POTENTIAL

Outlook: regional and close drive travel second

- Research indicates that travellers will move to travel to closer drive markets
- Recovery does not depend on air capacity returning
- Atlantic Canada accounts for close to one-half of overall non-resident visitation to Nova Scotia
- Based on current information, there is potential for regional travel recovery in 2020

TOURISM NOVA SCOTIA MARKETING PLANS

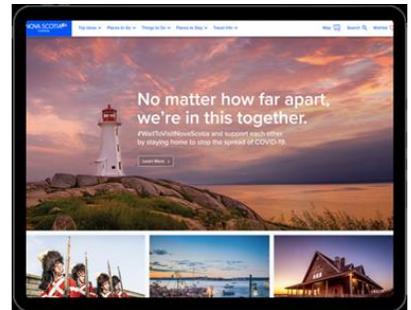
TNS MARKETING APPROACH

TNS's marketing approach currently has six components. TNS is working with our marketing agency of record, Destination Canada and Google to ensure we have the appropriate insights to help us identify the right time to go into the right markets with the right message.

Component # 1: Stay home marketing (underway).

Objective is to encourage travellers to stay home and stay safe until conditions improve.

Component # 2: Nova Scotia – Still Together Video / #WaitToVisitNovaScotia (Launched April 28). Objective is to share Nova Scotia's spirit of community and support for one another while staying home and staying safe during the COVID-19 pandemic. Also to keep Nova Scotia top of mind in a relevant and appropriate manner.



TNS MARKETING APPROACH ..cont'd

Component # 3: Nova Scotia marketing campaign (timing TBD). Objective is to give Nova Scotians compelling reasons to start travelling within the province again.

Component # 4: Regional marketing campaign (timing TBD). Objective is to give Atlantic Canadians compelling reasons to start travelling to Nova Scotia again

Component # 5: Target Markets (timing TBD). Objective is to let our target markets (to be defined based on, air capacity etc.) know we are open for business and looking forward to seeing them.

Component # 6: Nova Scotia confidence campaign: Part 2 (timing TBD). Objective is to continue to foster pride and confidence in the provincial tourism industry.