



**The Nova Scotia
Tourism Strategy 2000
(D R A F T)
September 13, 2000**

"Build yield,
Build season,
Build industry capacity"

EXECUTIVE SUMMARY

Building on Success

In March of 1996 the tourism sector in Nova Scotia collectively developed a landmark document entitled “*Strategy for Tourism*”. This strategy was the result of an unprecedented co-operative effort of the provincial government, the Tourism Industry Association of Nova Scotia, Voluntary Planning and the Atlantic Canada Opportunities Agency. The revenue growth goal in that strategy was achieved two years ahead of schedule, when annual tourism receipts cracked the billion dollar mark, in 1998.

The ideas in the 1996 “Strategy for Tourism” remain valid to this day. With the 1996 strategy now nearing the end of its intended life span, it is time to renew our focus. Consequently, in 1999, work began on the development of a new tourism strategy, guided by the Vision Committee of the Tourism Partnership Council - itself a legacy of the 1996 document.

A Starting Point

With the Tourism Partnership Council still a relatively new entity, it’s vision and mission are valid starting points for our new strategy:

TPC Vision Statement:

“Realize Nova Scotia’s tourism potential as a world-class four-season destination for the benefit of all Nova Scotians.”

At the highest level of our plan is the Tourism Partnership Council’s vision statement of how the development of the tourism industry is seen by the Council.

TPC Mission Statement:

“The Nova Scotia Tourism Partnership Council’s mission is to grow the tourism industry in the province, increasing the number of tourists that visit Nova Scotia and increasing the amount they spend while in the province.”

Based on the vision and mission, three high-level goals have been identified for the Nova Scotia Tourism Strategy 2000. They are:

1. **Industry Growth** - The 2000 strategy is intended to have a direct effect on economic growth for the tourism industry, individual business and the Nova Scotia economy.
2. **Sustainability** - This strategy focuses on ensuring that the actions taken to grow the industry

can be sustained for years to come and the things that are done today will provide a solid basis for long-term economic growth.

3. ***Quality of Life*** - As well as generating directly to revenues, tourism contributes economically to the quality of life for all Nova Scotians by providing employment, as well as generating tax revenues to fund health care and education. Tourism also provides infrastructure and recreational facilities which benefits tourists and Nova Scotians.

The vision, mission and high-level goals provide the general context for all elements of the strategy which follow.

Grassroots input, market-driven logic

Extensive consultations through general input sessions with industry across the province and key informant interviews with industry and government tourism professionals were conducted in May, 2000. Based on this input from more than 300 tourism operators and stakeholders, a number of key issues have been identified as pertinent to our strategy:

- The original goals of the 1996 Strategy are still valid
- Seasonality is a fundamental issue
- Preservation of our natural environment
- Maintenance and upgrading of infrastructure
- Transportation access
- The new economy, e-commerce and the internet
- Industry collaboration is essential.
- Human Resources needs
- More co-ordinated effort by a variety of provincial government departments
- Product development opportunities
- RTA and VIC viability
- Expand partnerships and create networks

The world as we know it

Combining information from industry consultations with what our research provides us with the information we need to describe our business environment. One way of making sense of all this material is to sort it according to strengths, weaknesses, opportunities and threats. This process, commonly known as a S.W.O.T. analysis helps us organize our thoughts about the strategy, set strategic objectives, and devise actions plans to achieve those objectives.

<i>Strengths:</i>	<i>Weaknesses:</i>	<i>Opportunities:</i>	<i>Threats:</i>
<ul style="list-style-type: none"> • Products • Partnerships • Price competitiveness 	<ul style="list-style-type: none"> • Capacity • Transportation Access • Size (resources) • Seasonality 	<ul style="list-style-type: none"> • Touring Markets • Niche Markets • Seasonality • Growth in air travel • Demographic trends 	<ul style="list-style-type: none"> • Competition • Fuel prices • Exchange rate changes • Fiscal environment • Access to capital • Concentration in distribution channels

**The Essence of the Strategy:
“Build Yield, Build Season, Build Industry Capacity”**

The essence of our strategy is to *Build Yield, Build Season and Build Industry Capacity*. It is imperative to attract the right customers and make sure they have every opportunity to buy quality experiences. It also means selling existing visitors more products at the community level, while they are here. Building season refers to utilizing our available capacity outside of peak periods. Building industry capacity is making sure we have the ability to develop and sustain the right products, infrastructure, human resources and skills to meet market needs.

Strategic Objectives

This strategy supports the goals and strategic focus with a structure focused on the following objectives:

- **#1. Grow revenues from the touring market** - Our traditional markets must be further penetrated by enhancing the current marketing approach and encouraging new product development. An immediate focus would be the implementation of a European travel trade strategy to capture return visits.
- **#2. Enhance yield** - Encourage existing visitors to stay in the province longer and spend more money.
- **#3. Build a 12-month season** - Build partnerships among communities and industry to increase shoulder and winter season visitation and spending.
- **#4. Develop viable niche markets** - Strengthen key niches, such as Outdoor Nature, Golf and Group Tours by creating a product development plan addressing niches. More packaging and marketing initiatives will be created around niche.
- **#5. Improve transportation access** - Improve infrastructure to support efficient,

convenient transportation.

- **#6. Improve the quality of our tourism product** - Build a collaborative approach to enhance quality within the industry, emphasizing communications and standards.
- **#7. Improve the business environment for tourism** - Through policies, plans and partnerships create an environment that is conducive to a healthy, sustainable and responsible growth of the tourism industry.

An integrated effort around these objectives will help us reach our high-level goals of industry growth, sustainability and quality of life for Nova Scotians. Each of these objectives are identified within the strategy for the next one to five years.

Highlights

There are several elements within these objectives that will have the greatest impact and potential on the tourism industry in the short to medium-term that must be identified. The following highlights identify the specific areas that are the immediate focus:

- **Seasonality** - As one of the major strategic objectives, the development of an integrated approach of product development and marketing among partners will increase shoulder and winter season visitation and spending.
- **Air Access** - Recognized as an immediate priority in the strategy, improved air access to our province is a necessary pre-existing condition for achieving our market opportunities.
- **Travel Trade** - This is an integrated part of our strategies for each of our market opportunities. It is imperative to work in partnership with the businesses that make up this distribution channel.
- **Internet** - This marketing tool will assist in improving the business environment within Nova Scotia. Internet is used everywhere within the elements of this strategy as a means to deliver programming and results, as well as developing new technical capacity, such as e-commerce.
- **Market-driven Product Development** - The 2000 strategy integrates product development with marketing, policy and research functions to address and co-ordinate common strategic objectives. There is a need to develop new products to fulfill changing customer needs.
- **Co-ordination and Integration** - The strategy is structured to promote approaches to common objectives that co-ordinate the efforts of partners and functional disciplines, such as policy, marketing and product development.

Reporting on Results

Measuring results is a key component of any strategy, because it tells us what is working and what isn't, and ensures accountability. The Tourism Partnership Council will report on progress towards this strategy's high level goals annually, in the form of a TPC report card.

Our plan identifies measurable objectives associated with the seven strategic objectives. All partners who agree to participate in the strategy activities will be asked to report annually on the appropriate measurable objectives.

Getting There

A strategy has limited usefulness if it doesn't address the general game plan for achieving our objectives and goals. That game plan has to outline the general approach and co-ordinate and assign responsibility for specific actions.

In this strategy the game plan is called the "Integrated Action Plan" and it is a detailed statement of who is doing what to achieve common goals. This action plan forms the template for our annual product development and marketing plans and details other activities, including those agreed to by the TPC's partners.

The action plans are one of the main methods for ensuring integration and co-ordination of effort because it lines different business functions up to address common objectives.

Correcting the Course

No plan is perfect! We anticipate the need to adjust our plan over the next few years. The TPC will consider proposed amendments to the plan according to a prescribed process that formally records changes to the strategy, along with the rationale for the change. Research, evaluation and continuous consultation with industry partners will help ensure that we stay on track, anticipate change and make appropriate adjustments to our strategy.

All Together Now...

Ultimately, no one organization will determine how successful we are in achieving our goals and realizing our vision for the tourism industry in Nova Scotia. We can and *will* work collectively and co-operatively to grow the industry, ensure sustainability and improve the quality of life for all Nova Scotians.