

*The following was presented to industry by Paul Stackhouse, Chair, Nova Scotia Tourism Vision Team, during the Chairman's Breakfast – Cornwallis Room, WTCC  
Tourism Summit 2006*

Good Morning Ladies and Gentlemen,

I am pleased today to bring you an update on the Nova Scotia Tourism Vision and the ambitious goal of doubling tourism revenues. In 2002, our industry and its partners announced this revenue goal. At that time, Nova Scotia generated \$1.29 billion toward the provincial economy. Following extensive discussion and consultation with tourism industry stakeholders, eleven key recommendations were agreed upon and announced. These were identified and prioritized to give us the best chance of success.

The Nova Scotia Tourism Vision Team then began steps necessary to both share and implement the Vision throughout the province via the charter partner organizations – these were the Nova Scotia Tourism Partnership Council, the Department of Tourism Culture and Heritage, the Tourism Industry Association of Nova Scotia along with the Atlantic Canada Opportunities Agency.

While it is disappointing that in light of the doubling of tourism revenue goal, three years later, in 2005, we saw the tourism industry generate the exact same amount: \$1.29 billion. We also know that it will take time and investment to grow revenues. It is important to note that while no significant revenue gains have been recorded to date, we have held our own when many other travel destinations are floundering. We have a Vision and are building a plan to support it, and we continue to be a strong and significant economic force in this province.

Most of you now know that there are eleven key Vision recommendations. Each of these are being addressed and pursued by volunteer task teams, supported by the partners and the Vision staff. The countless hours, expertise and efforts contributed by these volunteers are all greatly appreciated by the Vision team, and also deserve the recognition of everyone in this room this morning [applause]. The investment they make on behalf of our tourism industry is to be commended. From Chris Millier who leads the Quality Vision team to Jerry Staples who heads the Transportation Vision Recommendation, Bill Hay and his hard working Sustainable Tourism team, and all of the other team leaders and their teams - the dedication and commitment is obvious. They don't have to take time from their already heavy work loads to organize and meet and provide direction on their respective Vision Recommendations. They do so in order to make the Vision a reality, and we could not do it without them.

Regardless of the work of the Vision task teams, if we want to actualize the Vision and see the progress we need to see by 2012, the changes and accomplishments cannot only be at the Department of Tourism, the Tourism Partnership Council and TIANS. The changes need to be at the grass roots level. Tourism industry operators must demand change – and meet the challenges that change requires.

One great example where this has begun is in the launch of the Tourism Destination Area concept. Embraced and applauded by industry, the TDA efforts have been a catalyst for strategies, planning and a level of community collaboration that we had not seen previously. This is good news, but we have to ask ourselves: are we generating enhanced revenues for our communities due to these efforts or are we simply stressing volunteer resources? Circumstances will vary from community to community and so the TDA process can be a barometer of sorts for other Vision recommendations. Each one needs clear leadership and dedicated financial resources if we are going to achieve the advances we seek.

Some of the key Vision recommendations were adopted and are being advanced through existing strategic efforts of our partners – these included: Research, Performance-Based Marketing, Sustainable Workforce and the Nova Scotia Brand. However, advancing these recommendations according to any type of economic agenda has not yet been part of the planning process.

The Star Generator recommendation, one which holds a lot of potential for Nova Scotia, has taken a long time to be jump started. We recognize that and are working on it – examining ways in which we can affect significant new star generator investments or the enhancement of existing attractions.

It has become evident that the identification of potential economic benefits is an essential element in prioritizing the allocation of available resources. We are working on that as well, in order to enable the Tourism Vision Team partners to make better decisions.

So, we recognize the importance of applying economic metrics to help guide our strategies, and we also recognize that clearer communications with industry is required. Up until now, we have been experiencing a “building phase” of the Vision process. In many respects we have been laying the foundation for significant growth. As we head toward greater levels of implementation, it has become clear that greater integration is necessary between the task teams and improved outreach to industry is required.

Aside from the initiatives I have previously referenced, I also want to share with you this morning that there have been numerous other exciting advancements in the Vision process to date. Our key messages have always consistently advocated the requirement for ‘change’. (or should I say ‘revolution’) We are advancing the discussion surrounding the Administration of Tourism in our province and have emphasized the importance of more dialogue with the owners, operators and managers of tourism facilities across Nova Scotia.

Through the Quality Vision Team (QVT) lead by Chris Millier, we are working hard to establish a culture of quality in Nova Scotia – a necessary ingredient in meeting and surpassing visitor expectations in an increasingly competitive marketplace.

In partnership with the Nova Scotia Tourism Human Resource Council, we are exploring ways in which we can meet the growing sustainable work force concerns – finding qualified employees and keeping them is becoming increasingly difficult and with the exodus to western Canada, among other locations, we are facing a huge problem in keeping, let alone growing, our skilled workforce. One way we are trying to meet this challenge is by participating in a national human resource compensation study for the Tourism Industry, which has as its core examination of the current and future workforce needs as relates to compensation.

On other fronts we are spearheading multi-faceted discussions regarding road, air, rail and water based transportation. Through the Transportation Committee, lead by Jerry Staples, we are looking closely at what transportation factors are currently hindering growth, or could be put in place to help grow tourism revenues for Nova Scotia. For example, we now know that a 10% increase in visitation would result in a generation of \$14 million in new tourism revenues. But the question still remains, “How will we get them here?”

Well, an average of one charter flight per week from one destination @ 80% capacity would return more than \$14 million per year...add 4 destinations and it is a whopping \$57 million per year of new tourism revenue. It is important that all of our partners focus on scenarios like this – ones we know can make a significant difference. (BLUE SKY air policy)

The Tourism Vision Team is responsible for the work of the numerous committees and task forces which have led to work plans and vital new tools and resources for the industry.

I would like to highlight some of the ways in which the TVT has provided support:

- Vision supported the Tourism Destination Area process by teaming with the TPC and the Department of Tourism to present Roger Brooks for Product Development Day and Jens Thraenhart, CTC, both of whom met with representatives of ongoing TDA initiatives throughout Nova Scotia.
- As well, assistance was provided in the production and distribution of Destination Diary – an important communication tool for TDA communities and stakeholders.
- The Tourism Vision Team set in motion the single largest broad based analysis of the administrative structure of tourism ever undertaken in Nova Scotia. If you have not yet read the results, both the Executive Summary and the full report are available on the Vision website. The 3 key recommendations from the study were:
  - o Consolidation of various entities involved in the Tourism Industry in Nova Scotia should be actively pursued.
  - o The establishment of a private-public partnership should be considered to lead the administrative function of the Tourism Industry in Nova Scotia.
  - o A single web-site portal should be developed as a central access point for information regarding the Tourism Industry in Nova Scotia.

- The Vision Team is already responding to these recommendations. TVT is developing an exciting new web-based search portal, Tourismcentral.com. It is being developed to provide a single access point to search multiple sources for industry tools and information and is customized for Nova Scotia's tourism operators and stakeholders. Tourismcentral.com will be launched in the 1<sup>st</sup> quarter of 2007 and will be a valuable industry resource.

The TVT applauds the Destination Southwest Nova Scotia partners for their foresight and perseverance in bringing together the 3 regional tourism industry associations in southwestern Nova Scotia, which is an excellent example of consolidation of entities and a willingness to change. We are aware that similar initiatives are being considered in other regions of the province, and will offer our support and encourage other groups to follow suit wherever opportunities are identified.

With respect to the recommendation regarding establishment of a private-public partnership, the TVT is currently undertaking a more in depth analysis to determine the most appropriate next steps.

- Under the guidance of its Star Generator Task Force, the TVT, working in partnership, has initiated dialogue with both Parks Canada and Bay of Fundy industry stakeholders toward advancing initiatives related to the Star Generator recommendation.
- Vision has committed to supporting the innovative work begun by the SMART group of the TPC's Long Term Planning Committee, and is planning the compilation of Nova Scotia success stories as well as the development of pilot projects to encourage the implementation of the Sustainable Tourism Code of Ethics.

As we head, quickly, toward 2012, we have long talked about a "Vision filter" but we now must apply it more consistently and more steadfastly than ever before. It is important to note that as we move forward from this point, the Tourism Vision Work Plan will be noticeably different than in previous years. Specifically in the application of 'economic agenda' criteria to the eleven key recommendations and in the strategic, planned, incremental investment needed to grow our industry. The Vision Team is actively working on the development of these criteria under the leadership of Gordon Stewart.

If you are wondering what you can do to improve your revenues and strengthen our industry there are many ways you can make a difference. Consider this: it is simple arithmetic yet difficult to believe sometimes, that a 10% price increase on all our products & services would generate \$90 million more per year in new tourism revenues! Something to think about – but just thinking about it won't make it happen. We have to take action! Consider as well, that this projection does not count growth in new convention business, the development of new products for consumers, extending our season, or increasing air capacity from other parts of the world beyond existing charter service.

As I conclude my update I want to leave you with a few things to keep in mind:

- We have limited resources and they must be deployed strategically, so we are often faced with making tough decisions rather than popular ones.
- We all have a role to play in encouraging those who lead and represent us to recognize our potential and the need to increase the levels of investment and commitment needed to realize our full potential.
- At the same time we must all remember that it is also up to each of us to initiate 'change', the kind of 'change' that will make a significant difference.
  - o Start a revolution!!
  - o Action speaks louder than word's.
  - o If you always do what you always did, you'll always get what you always got.
- We have a lot of room to grow.
- We must stay the course.

And, above all, we must remember that the Vision for Nova Scotia Tourism is one of our best chances to crack our *status quo* business cycle.

I closing I invite you to visit [nstourismvision.com](http://nstourismvision.com) for regular updates, and I encourage you to share with us your success stories and your challenges. I also give you my commitment, as Chair of the Nova Scotia Tourism Vision Team that we will continue to work hard on behalf of the entire industry across Nova Scotia – in the pursuit of a stronger, healthier and wealthier future for us all.

“Tout ensemble – together”

Thank you.

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For more information on the Nova Scotia Vision for Tourism, please visit:

**[www.nstourismvision.com](http://www.nstourismvision.com)**

NS Tourism Vision Team

1099 Marginal Road, Suite 201

Halifax NS B3H 4P7

T: 902-482-6032

F: 902-482-6033

[info@nstourismvision.com](mailto:info@nstourismvision.com)