

tians
The voice of tourism



DEAR INDUSTRY PARTNER,

As we face Year Two of the global pandemic there are signs of hope for a return to what we knew was normal and daily reminders that rebuilding the Nova Scotia tourism industry will continue to challenge all of us. Tourism is resilient and will recover but it cannot be business as usual. Building confidence both within the public and within businesses will be an important part of the stabilization and rebuild. How we adapt to the changing marketplace, technology, quality and innovation will also determine our future success. Pre-pandemic, Nova Scotia's tourism industry accounted for over 50,000 jobs and revenue was \$2.6 Billion accounting for over \$350 million in tax revenue for all levels of government. With projections of total revenue of \$900,000 during 2020, this represents a loss reported at \$1.6 Billion and over 20,000 jobs still displaced.

The containment of the COVID-19 pandemic is of paramount importance to the travel economy and the communities in which our businesses operate. The industry has been supportive of measures taken to mitigate the impact of this pandemic and protect the health and safety of Nova Scotians. In fact, against popular opinion, early on TIANS advocated for caution in re-opening borders too fast, as we knew tourism businesses could not survive a continued and sustained full lock-down. At the same time, we believed there were opportunities to leverage the current conditions and the positioning of Nova Scotia as a safe destination; there is still much more we can do with the domestic market.

Ongoing government intervention will be required to address immediate structural issues to ensure viable businesses survive and our tourism infrastructure, such as motorcoach and air routes, are secured. No other sector has been as impacted as tourism, and while a number of programs have been launched, we need continued targeted supports and a strategic, wholistic approach to grow tourism in a post COVID-19 environment.

Over the past year TIANS has been your voice to shape a number of policy supports. Our work with our partners across Canada has resulted in federal programs that have greatly assisted operators survive year-one impacts of COVID-19 disruption. We will continue to push for targeted relief at both a federal and provincial level.

We want to thank TIANS Members for your steadfast support and efforts in your own communities as we navigate these uncharted and unprecedented times. We look forward to better days as we rebuild Nova Scotia's #1 Service Export sector.

Sincerely,

Judy Saunders, *TIANS Chair*

Darlene Grant Fiander, *TIANS President*



EXTRAORDINARY TIMES REQUIRED EXTRAORDINARY EFFORT

Tourism is a global industry facing the profound global impact of the COVID-19 pandemic. The past year has highlighted the importance of tourism stakeholders working together, aligning on issues and speaking with a singular voice.

During 2020, TIANS escalated efforts on the national and regional front to ensure tourism interests were in the forefront of policy makers designing program supports.

While TIANS has always been a champion of collaboration, our advocacy efforts in response to the pandemic during the past year were elevated at National, Regional and Provincial levels. Working closely with our partners from the Provincial and Territorial Tourism Industry Association

Network (PTTIA), the Tourism Industry Association of Canada (TIAC), Tourism HR Canada (THRC) and others, TIANS took part in numerous presentations and discussions with key government policymakers and Members of Parliament. In September 2020, TIANS became a founding member of the **Hardest Hit Coalition**, a national campaign supporting the messaging around the urgent need for the government to address targeted relief for the sector. Building on the Hardest Hit

Campaign momentum, TIANS also worked with the PTTIA and TIAC on the creation of the **National Tourism Recovery Strategy** which focused on three core pillars (*below*) required from government to support and sustain the Industry towards future recovery. The Strategy, which was submitted to the Federal government prior to the Budget, influenced the adaptation and expansion of the national emergency subsidy programs for wages and rent (CEWS and CERS).

NATIONAL TOURISM RECOVERY STRATEGY PILLARS

Supporting Business Solvency

- Financial Supports
- CERS and CEWS
- RRRF and HASCAP
- Aviation

Championing Safety

- Tax Credits for Safety Protocols
- Safety and Testing
- Borders – Reopening Plans and Policy

Global Competitiveness

- Tax Incentives Inciting Domestic Travel
- Unlock Potential – Marquee Events
- Business Events and Urban Recovery Plan
- Labour – Skills Capacity





PANDEMIC 2020: IMPACT ON TOURISM ECONOMY

PRE-PANDEMIC – CANADA SAW RECORD GROWTH IN TOURISM



NOVA SCOTIA IMPACT

\$2.6 BILLION IN REVENUE 2019
ON TRACK TO GOAL OF \$4B BY 2024



NATIONAL IMPACT

47% DROP
2019 REVENUES (\$105B)



\$900 MILLION
IN REVENUE 2020



65% DECLINE

ALIGNMENT WITH PARTNERS

During the past year TIANS President, who serves as Chair of the Atlantic Canada Caucus of Tourism Industry Associations (TIA), has helped escalate a number of priorities with governments at both the federal and provincial level. Joint correspondence from the Caucus to government leaders has heightened awareness and support on issues of safeguarding our aviation and motorcoach infrastructure which will be vital to rebuilding routes, access and intermodal transportation over the coming years.



Targeted Aviation Focus for Atlantic Canada – Halifax International Airport Authority; Regional Routes

Targeted Supports – CEWS & CERS for Tourism Sector; Pivot Away from Broad Access

Motorcoach Infrastructure – Intermodal Strategy for the Region

LEADERSHIP

TOURISM STRONG

TourismStrong.ca – Information hub was launched in the Spring of 2020 in response to Industry specific needs. With over 10,000 hits, the portal has become the trusted site for current and relevant COVID-19 news, resources and supports for Industry. Strong adoption from the Industry resulted in the subsequent development of a Tourism Strong Atlantic portal in the Summer of 2020.

GOVERNMENT RELATIONS

During the past year TIANS has focused a significant amount of effort around government relations and communications. TIANS leadership met regularly with Cabinet and Deputy Ministers, MLA's, and other political leaders to provide insight into the impact of COVID-19 on the Industry, and where programming gaps exist. Prior to the selection of the new Liberal Leader, TIANS hosted tourism platform discussions with all candidates re COVID-19 response, as well as their long-term vision for tourism's role in the provincial economy. Regular virtual industry meetings were held, providing operators direct access to representatives from key government departments such as IEG, Health, LAE and Intergovernmental Affairs.

MINISTERIAL TOURISM STABILIZATION AND RECOVERY WORKING GROUP

Formed by TIANS in 2020 to provide a forum for Industry and Government to work collaboratively to address immediate concerns as a result of the global pandemic, the Working Group includes representation from Tourism Nova Scotia and ACOA. Focused on advancing broad sector initiatives for Nova Scotia's Tourism economy and complement existing supports, the following Sub-Committees were formed: Taxation, Loans & Interest Assist, and Travel Incentive and Confidence Campaign.

COMMUNICATIONS

Webinar Series – TIANS worked with financial accounting firms, tax specialists, insurance associations and government agencies, to deliver numerous webinars for tourism operators.

Podcast – Building confidence in the industry's capacity to adapt and recover is key. During 2020, TIANS worked with a media specialist to develop a podcast series which was made available on various platforms. Business operators were interviewed and shared perspective on best practices around retooling business plans and building for the future.



ONLINE TRAINING RESOURCES, RESEARCH AND SUPPORTS

Clean it Right – To help operators develop knowledge and skills and support public confidence, TIANs secured and launched the Clean it Right Program in 2020 which offered modules focused on Accommodations, Food Services and Retail. In partnership with Tourism Nova Scotia, Industry was provided complimentary access to the program. To date, over 1200 individuals have taken the training and over 140 certified business have been provided with Clean it Right marketing collateral and highlighted on Novascotia.com.



Exclusive Partnership with Cornell University – TIANs partnership with Cornell Business School offers executive level management supports for tourism businesses as they manage and plan for rebuilding. Available in more than 25 professionally themed courses.

Research – Direct links to National associations and research, including Destination Canada, Hotel Association of Canada, Restaurants Canada, Tourism Industry Association of Canada, Conference Board of Canada and others. TIANs has aligned on a number of efforts with our national partners in 2020/2021.

Tourism Help Desk –

The evolving crisis has resulted in an information overload for many small and medium sized operators. A dedicated Help Desk was established at the TIANs office early on in the pandemic to work directly with operators, discerning best access to programs and connecting to appropriate agencies or resources. Hundreds of calls and emails have been responded to and TIANs continues to be of service to the industry at large.

REBUILDING

TourismStrong.ca – The Tourism Strong portal has been adopted Atlantic wide with a primary focus on news, resources and rebuilding activities. Bringing information to industry in a one stop shop will continue to be a key part of the tool kit, as we rebuild our tourism product.

Industry Survey Work – TIANs is conducting regular surveys in real time to capture economic data and also respond to Industry needs and priority areas of focus. Surveys have provided insight into business support gaps and needs, specific operational challenges such as insurance access and cost and the anticipated challenges around labour impacting business capacity and quality as the Industry looks to reopen.

Government Input – Using tourism specific data on the COVID-19 impact, TIANs continues to feed into government policy and new

program supports for operators. Funding, tax breaks, incentives — all will be crucial to the hardest hit sector, as we rebuild.

Support Local – TIANs continues to push for a Nova Scotia First Approach in rebuilding our Sector. By supporting our many businesses and communities the local economy will begin to grow once again. Regrowth and rebuilding takes time and resiliency.

REOPENING STRATEGY

In partnership with colleagues from New Brunswick and Prince Edward Island along with relevant Health and Safety government department representatives, TIANs led the development of a Maritime Reopening Strategy. The proposed strategy provides an outline to create consistent, safe reopening protocols across the regional provincial borders and can serve as a guideline for receptive tour operators and their associated suppliers.

In appreciation for their ongoing support during these challenging times, TIANs would like to extend sincere appreciation to Tourism Nova Scotia, Atlantic Canada Opportunities Agency- Nova Scotia (ACOA-NS), Nova Scotia Apprenticeship Agency and the Nova Scotia Department of Labour and Advanced Education.



NOVA SCOTIA TOURISM HUMAN RESOURCE COUNCIL

On the Labour front, Tourism has been hard hit by the global pandemic.

Within the first three months, Nova Scotia lost 30,000 jobs and as of March 2021, we are still down 20,000.

The Nova Scotia Tourism Human Resource Council (NSTHRC) has been focused on innovative program delivery. During 2020, we continued to provide training support for furloughed workers and owners. We had to pivot like you and now a number of training programs are available online; as a result, over 5000 tourism employers and employees took advantage of training.

Attraction and Retention of labour is, and will continue to be, a greater challenge in a post COVID-19 environment. Over the past year we have done extensive programming reviews and have worked closely with our partners at Tourism HR Canada to ensure we have the latest labour research for Nova Scotia and support tools for employers.

Through our seasonality project, we continued to support businesses. We have completed a number of innovative cross sector projects with the fisheries sector to look at how different sectors can leverage workers and encourage entrepreneurship in

experiential tourism. Our efforts to enhance training, address seasonality and provide credentials to owners and senior managers continues, and will be even more important as we rebuild our leadership capacity in the sector.

As we redesign a Labour Strategy that addresses the new realities of work, we are committed to rebuilding the NS tourism labour force working with you. Nova Scotia is resilient and Nova Scotia workers even more so — together we will adapt, reshape and reprioritize our greatest asset.

As we move into the critical phase of reopening, please take advantage of the tools and resources available through the Nova Scotia Tourism Human Resource Council. Whether you need tools for recruitment, training resources or leadership opportunities we are here to support.

Sincerely,

Wes Surrett, Chair

Nova Scotia Tourism Human Resource Council



DIFFERENT WAY OF DOING BUSINESS

ENGAGING YOUTH

Serve it Up High School Culinary Hub launched – NSTHRC working with Nova Scotia Apprenticeship Agency to attract youth into careers in tourism. Providing a launching pad today for the professionally trained Cooks for tomorrow. As with many other educational offerings in the past year, this program has pivoted to accommodate learning opportunities despite the challenges posed by COVID-19 related restrictions.



EMERIT NATIONAL CERTIFICATION AND TRAINING

During the past year, Industry continued to engage in professional development through the emerit National Certification Program coordinated by NSTHRC. 70 Tourism Professionals earned their emerit Certification in the last year, the pinnacle credential for the tourism workforce in Canada.

TOURISM SCHOLARSHIPS

NSTHRC offers annual scholarships in support of higher education within the tourism industry. Scholarships support high school and post-secondary students and tourism professionals. In 2020/2021 \$10,000 in support was awarded.

TOURISM TALENT.COM

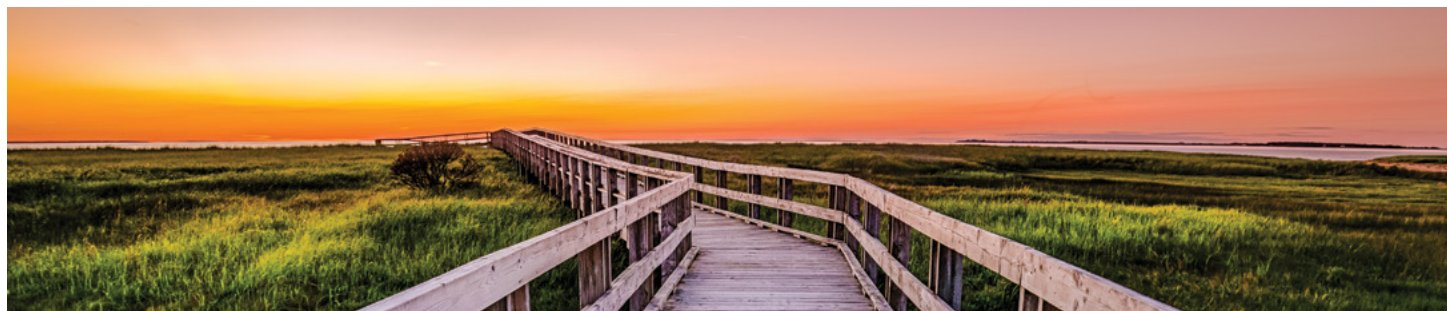
TourismTalent.com is an innovative recruitment tool created exclusively for tourism employers and job seekers in Nova Scotia. Now more than ever this portal is an integral resource for talent in our Sector.

TRAINING OPPORTUNITIES

Sign up for one of NSTHRC's many training courses. Nova Scotia Best Service Excellence Program continues to be the leading customer services program for the tourism sector; SuperHost — Foundations of Service Quality is the next step up in customer excellence and service quality. ServeRight

Responsible Beverage Service programs for Servers and Managers have been modified to include cannabis use, as well as alcohol, to keep current with industry needs. All programming is available online; in-person sessions upon request.

- **Pre-Pandemic** – In 2019 Tourism employed 50,000 Nova Scotians; 1 in 3 people begin working in a tourism job
- **NSTHRC Online Campus and emerit Online Portal** – More than 5000 employees took online training last year
- **Cornell University** – 25 professional themed courses are available through TIANs/NSTHRC's exclusive eCornell custom online campus



THE WORK HAS NOT STOPPED

While COVID-19 has consumed our minds and efforts — the work of our Association did not stop. Tourism will recover and it is important that we continue to work on the systemic issues and challenges facing the sector.

BUSINESS OF TOURISM

TIANS has continued to advocate for a reset of how Tourism is managed in the province to foster the right conditions for the Industry to realize its potential to drive the economy, creating associated employment and tax spinoff. The implementation of the Tourist Accommodation Registry Act by Government came into effect in 2020. TIANS had worked for a number of years with Industry and government to champion creation of a tool to address the short-term rental issue. As the Registry is growing, TIANS is pushing for an adjustment to be made that allows the camping sector to register, as had been the original intent as the new regulations were being developed.

ENVIRONMENT

TIANS supported a number of files related to environment issues over the past year. These have included calling on government to complete the Protected Areas Network of Parks and Wilderness Areas in Nova Scotia. Specific areas which TIANS championed over the past year have included Ingram River and Archibald Lake Wilderness Area designations. Also in 2020, TIANS called on

HRM to finalize a land purchase required to secure Blue Mountain Birch Cove Lakes Regional Wilderness Park (BMBC). This is now completed and the result will be a unique urban wilderness park for visitors and residents.

SEASONALITY

TIANS continues to encourage the development of tourism products and experiences that will extend the season and drive economic activity across the province. The Association has been a strong advocate for policy shifts to the Seasonal Tourist Business Designation Program to enable businesses to extend their operational season without a taxation penalty.

INNOVATION AND QUALITY

NSTHRC coordinated and led a series of marine tourism experience workshops for over 60 fishers. Workshops focused on marine passenger federal and provincial regulations, tourism product development, marketing, and relevant occupational health and safety requirements. It is expected this cross-sectoral program will result in the addition of new and innovative product for visitors. TIANS has a long standing commitment to quality

as a key pillar in supporting the competitiveness of Nova Scotia as a destination. This will be even more crucial as the Industry rebuilds post-pandemic and we will continue our efforts with initiatives such as expansion and updates for the Nova Scotia Approved Program.

LABOUR

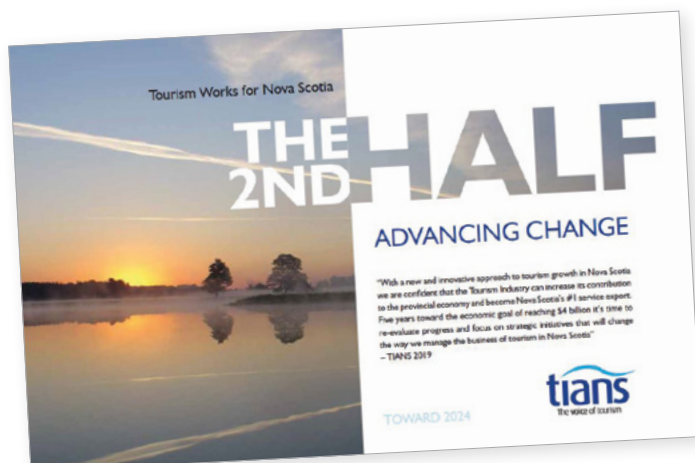
As the Sector Council for Labour and Skills for the Tourism Industry, NSTHRC continued to focus on the development of the workforce and related supports for employers related to recruitment and retention. NSTHRC pivoted to support operators and staff with relevant modular programming and provided training throughout the past year for over 5000 Participants. Content was redeveloped and moved to online platforms and the Council worked with participants and facilitators to ensure programming was provided that continued to meet our high-quality standards.

GOING FORWARD

Just before the COVID-19 pandemic hit, TIANS was about to release 'The 2nd Half' document to look at how we could achieve Goal #14 of the Ivany Report — annual Tourism Revenue of \$4 Billion by 2024. We were halfway there and we knew we needed a different approach to reach tourism's economic potential. This has not changed; in fact, it is even more imperative that we address systemic issues impeding business competitiveness. We need to develop a broader strategy for growth, review the management structure so that Industry is leading the way and ensure our product, people and experiences represent quality and authenticity that visitors will remember.

We need to consider how we leverage the cruise sector, to spread the wealth throughout Nova Scotia Ports; we need an intermodal strategy that considers the movement of people and the role of HIAA; we need to leverage public investment in the sector; and most importantly, we need to take a Nova Scotia First approach to decisions that are evidenced based and foster innovation.

The Tourism Industry in Nova Scotia can recover and rebuild, but we have to take this extraordinary opportunity to be critical of how we do business and be brave enough to change. TIANS commits to lead on these principles.



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GET INVOLVED

You are an important part of the tourism industry in Nova Scotia. Now more than ever we encourage you to add your voice to the collective that is shaping the future of tourism in this province. Please take a moment to send us your comments so that we can continue to provide excellent service on your behalf. Do you have a question about an industry issue or trend? Is there a benefit that you would like to have access to, or would you like to share feedback on current benefit suppliers?